

FACTORS INFLUENCING BRAND LOYALTY TO CRAFT BREWERIES IN NORTH CAROLINA

by

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In 2005 North Carolina passed a law allowing breweries to give product samples to employees and guests. The law also changed the definition of a malt beverage and increased the amount of alcohol by volume (ABV) from 6%ABV to 15%ABV, allowing brewers to legally make and distribute high gravity craft brews. Since that law has passed, 23 more breweries have opened in North Carolina (North Carolina Alcoholic Beverage Control 2010 Annual Report). The purpose of this study is to gain a clearer understanding of what factors influence brand loyalty to microbreweries. The study looks at why visitors to Mother Earth Brewery in Kinston, North Carolina and Aviator Brewery in Fuquay-Varina, North Carolina chose to visit and purchase from that microbrewery instead of other breweries by examining concepts used in brand loyalty, access, environmental consumption, connection with the community, quality and satisfaction, desire for unique consumer products, and involvement in the industry. Results show that while *access*, *connection with the community*, and *satisfaction* are important to respondents, *connection with the community*, *satisfaction*, and *uniqueness* are the three factors that most align themselves with brand loyalty. *Connection with the community* was the most important factor in influencing brand loyalty especially among residents and those born in the study region.

FACTORS INFLUENCING BRAND LOYALTY TO CRAFT BREWERIES IN NORTH CAROLINA

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TABLE OF CONTENTS

LIST OF TABLES.....	iv
LIST OF FIGURES.....	vi
CHAPTER 1: INTRODUCTION	1
Brewery Market in the United States and North Carolina	2
Craft Breweries and Tourism – Making a Connection	2
Objectives of the Study	5
Organization of Thesis	6
Definitions	6
CHAPTER 2: LITERATURE REVIEW	8
Brand Loyalty.....	8
Access	13
Environmental Consumption	16
Desire for Unique Consumer Products	18
Quality and Satisfaction	19
Involvement	20
Connection with the Community	22
CHAPTER 3: METHODS	27
Study Area	27
Sample Definition and Data Collection	28
Survey Development	29
Brand Loyalty	30
Access	30

Environmental Consumption	32
Connection with the Community	33
Desire for Unique Consumer Products	35
Satisfaction	36
Involvement	37
Pilot Testing	38
Analysis	39
CHAPTER 4: RESULTS	41
Introduction	41
Sample Profile	41
Examining Reliability within Each Loyalty Factor	45
Determining which Factor Most Influences Brand Loyalty	51
Examining Differences between Socio-demographic Groups	53
Examining Differences in Response Across Breweries	60
Summary	61
CHAPTER 5: DISCUSSION AND CONCLUSIONS	63
Introduction	63
Summary of Tests	63
Implications	69
Limitations	72
Suggestions for Future Research	76
Summary and Conclusions	77
REFERENCES	79

APPENDECIES	83
Appendix A: Factors Influencing Brand Loyalty: Mother Earth Survey	83
Appendix B: Factors Influencing Brand Loyalty: Aviator Survey	94
Appendix C: Participant Sign-Up List: Mother Earth	106
Appendix D: Participant Sign-Up List: Aviator	107
Appendix E: Initial Contact Email: Mother Earth	108
Appendix F: Initial Contact Email: Aviator	109
Appendix G: Secondary Email Request: Mother Earth	110
Appendix H: Secondary Email Request: Aviator	111
Appendix I: Final Email Request: Mother Earth	112
Appendix J: Final Email Request: Aviator	113
Appendix K: ECU UMC IRB Approval Letter	114

LIST OF TABLES

Table 1.1: Brewery numbers in the United States	1
Table 1.2: NC brewery numbers by the year	2
Table 3.1: Study area population and average annual income	27
Table 3.2: Schedule of tours at targeted breweries	29
Table 3.3: Survey items related to <i>Loyalty</i>	30
Table 3.4: Survey items related to <i>Access</i>	31
Table 3.5: Survey items related to <i>Environmental Consumption</i>	32
Table 3.6: Survey items related to <i>Connection with the Local Community</i>	34
Table 3.7: Survey items related to <i>Desire for Unique Consumer Products</i>	36
Table 3.8: Survey items related to <i>Satisfaction</i>	37
Table 3.9: Survey items related to <i>Involvement</i>	38
Table 3.10: Expert panel for pilot test	39
Table 4.1: Data collection dates and numbers	41
Table 4.2: Socio-demographic profile of sample	43
Table 4.3: Residence frequencies	44
Table 4.4: Birthplace frequencies	44
Table 4.5: Cronbach's Alpha based on standardized results for itemized loyalty factors	46
Table 4.6: Mean scores from combined data	51
Table 4.7: Multiple regression summary statistics	52
Table 4.8: Brand loyalty to craft breweries and its influencing factors and residence	54
Table 4.9: Brand loyalty to craft breweries and its influencing factors and gender	55
Table 4.10: Brand loyalty to craft breweries and its influencing factors and birthplace	56

Table 4.11: Mean ranks within factors and socio-demographics	59
Table 4.12: Mean ranks comparing breweries	61
Table 5.1: Data collection dates and external factors	75

LIST OF FIGURES

Figure 2.1: A framework for customer loyalty	9
Figure 2.2: Brand equity ten	11
Figure 2.3: Experience economy	16

CHAPTER 1: INTRODUCTION

Brewery Market in the United States and North Carolina

In 1900 there were 1,751 breweries in the United States. That number decreased to 1,498 by 1910 (Schnell & Reese, 2003). During prohibition (1920-1933) the majority of breweries in the United States were shut down. The first post-prohibition craft brewery in the United States opened when Fritz Maytag bought out Anchor Brewing Company in San Francisco in 1966, and developed it as a craft brewery outlet. A craft brewery is one with an all malt product line or has at least 50% of its volume in all malt beers or beers that use adjuncts to enhance the flavor (rather than lightening it). Other entrepreneurs began opening their own craft breweries in 1977 (Tremblay, 2005). In 1982 there were 82 breweries in the entirety of the United States. However, by 1997 there were 1,273 breweries and in 2002 there were around 1,500 small-scale craft breweries and brewpubs. According to the Brewers Association the brewery count in the United States is currently 1,949 (Brewers Association, 2012) (Table 1.1).

Table 1.1: Number of Breweries in the United States

Year	Number of Breweries
1900	1,751
1910	1,498
1982	82
1997	1,273
2002	1,500
2012	1,949

The first brewery to open in North Carolina (NC) post-prohibition was the Weeping Radish Brewery in the Outer Banks in 1986 (Table 1.2). Weeping Radish remained the only brewery in North Carolina through 1990. By 1995 there were six breweries in the state, 17 in 2000, 32 by 2005, and there are currently 55 active breweries in NC (North Carolina Alcohol and Beverage Control 2011).

Table 1.2: Number of breweries in NC by year

Year	Number of Breweries
1986	2
2000	17
2005	32
2012	55

In 2005 North Carolina passed a law allowing breweries to give product samples to employees and guests. The law also changed the definition of a malt beverage and increased the amount of alcohol by volume (ABV) from 6%ABV to 15%ABV, allowing brewers to legally make and distribute high gravity craft brews (North Carolina Alcoholic Beverage Control 2010 Annual Report). While some breweries encourage visits by offering brewery tours or even special events, little has been done to calculate how many people visit breweries each year, where they are coming from, or why they choose to visit one brewery over another. Aside from market research when planning to open a brewery, little research is evident in the literature that determines the level of support a community might have for the brewery and how they react to the types of visitors to the brewery.

Craft breweries and Tourism – Making a Connection

According to the United States Travel Association (USTA), the tourism industry was responsible for 7.4 million jobs in the U.S. and brought in \$113 billion in tax revenue in 2009 (U.S. Travel Association, 2010). North Carolina plays an important role in the generation of tourism dollars. As the sixth most visited state, North Carolina generated \$31.3 billion in direct, indirect and induced tourism sales and the tourism industry as a whole employed 362,052 jobs in 2010 (NC Department of Commerce, 2010).

Sustainable tourism is an important segment within the tourism industry. According to Dolnicar et. al (2008):

The central aim of sustainable tourism research has been to identify how an economically viable tourism industry can be developed and maintained at a destination while minimizing adverse environmental impacts (the 'ecological footprint'), and in doing so, preserve the destination's natural and cultural resources for both residents and future generations of tourists. (p. 197)

Other niche markets within tourism are adventure tourism, cultural and heritage tourism, farm tourism, and culinary tourism. Culinary tourism is a fast growing niche within the tourism industry that "emphasizes unique foods and dishes from the culture of the host region" (Green & Dougherty, 2009). Culinary tourists tend to spend more money at their destination than mass tourism travelers (around \$1,000 more than mass tourists per trip) and therefore represent a market that destinations are trying to attract (U.S. Travel Association, 2010). By developing culinary tourism experiences, a community opens up opportunities for involvement by local restaurants, farmers, and ranchers. "Tourists are seeking authentic and unique experiences and the consumption of local food and beverages brings the tourist closer to the host culture" (Plummer et al., 2005). Culinary tourism has the potential to attract the sustainable traveler through consuming organically and or locally grown foods, selecting heritage food items as souvenirs, and by eating at locally owned restaurants, or restaurants that employ sustainable practices.

An extension of the culinary tourism industry is beverage tourism. Wine tourism has become an increasingly large market with winery tours throughout the United States striving to compete with the wine market in Europe. Many people participate in wine tourism while on vacation, although it is not always the primary purpose for the trip (Barber, Deale, & Taylor, 2010). According to Brown and Getz (2005, p.266), "wine tourism is a form of special-interest travel based on the desire to visit wine-producing regions or in which travelers are induced to visit wine-producing regions and wineries in particular, while traveling for other reasons."

Wineries and wine tourism place a very high value on the health of the natural environment. At the same time, wineries take up a large amount of land and require heavy machinery to process the grapes. Sustainability within wine tourism is a controversial topic because of the difficulty to balance long-term economic benefits and the desire for protection of the surrounding natural resources (Poitras and Getz). Several wineries are moving towards more sustainable practices and are trying to reach out to the sustainable tourism market. According to Poitras and Getz (2006, p. 426), “sustainable development and marketing principles are now being applied to tourism in many settings, although there is a need to make them relevant to specific forms of tourism and related niche markets such as wine tourism”.

Beer tourism can be defined as “visitation to breweries, beer festivals and beer shows for which beer tasting and experiencing the attributes of beer region are the prime motivating factors for visitors” (Plummer et al., 2005, p. 450). Similar to wine tourism, there are two primary forms of beer tourists; those who are traveling for the purpose of visiting the brewery, and those who visit the brewery as a part of a larger visit to the area.

At the same time, microbreweries are one of the many small ways in which communities have been reaffirming their local identity (Schnell & Reese, 2003) and potentially attracting tourists. As the neo-localism (‘buy local’) movement increases, so does the potential interest in purchasing local beers and visiting the local craft brewery when on vacation. Because beer tourism is a growing niche in the tourism industry, it is important to study the factors that influence brand loyalty for visitors of craft breweries. The purpose of this study is to gain a clearer understanding of what factors influence brand loyalty to craft breweries.

Objectives of the Study

A lot of research has been done to determine factors that influence brand loyalty and brand equity (Livesey & Lennon 1978; Aaker 1996; Day 1969; Jacoby 1978). The influential factors incorporated into this study in terms of visitor brand loyalty are: 1) accessibility to the product and to the company, 2) environmental consumption, 3) connection with the local community, 4) desire for unique consumer products, 5) quality and satisfaction, and 6) recreation involvement.

This study setting is Mother Earth Brewery in Kinston, North Carolina and Aviator Brewery in Fuquay-Varina, North Carolina. In addition to investigating the driving factors of visitor brand loyalty to these breweries, the thesis examines if there is a difference among visitors to craft breweries and which factors are more important in influencing brand loyalty. This study aims to become a tool for craft breweries to increase their brand loyalty among beer tourists, and by applying some of the successful practices, learn what can be done to create a tourism attraction. The overarching research question is: *What factors most influence brand loyalty to craft breweries?*

However, two other questions will be explored:

- Is there a difference among brewery visitors in terms of the six factors that influence brand loyalty?
- Do visitors to different breweries vary in their brand loyalty and influential factors?

Organization of Thesis

Chapter one provides an introduction to the research by describing the brewing industry in the United States and specifically in North Carolina, making a connection between the craft brewery industry and tourism, and describing the objectives of the study. The first chapter also provides key definitions and the delimitations and limitations to the study.

Chapter two provides a background of literature related to the various terms and theories used to describe the study. It provides a background on the brewing industry, local movements, and the importance of brand equity in developing a craft brewery as a tourism attractor. The second part of chapter two looks at each section of the survey and originating literature.

Chapter three outlines the methods used to carry out the study and how the survey instrument was developed while chapter four discusses the results of the survey used in this study.

Chapter four describes results of the survey and compares the results from different parts of the survey.

Chapter five provides a conclusion and findings of the research while providing suggestions for further research and marketing tools for craft breweries in the industry and those starting up in the future.

Definitions

The following terms defined below are common terminology used throughout the study.

Microbrewery: a brewery that produces less than 15,000 barrels of beer per year and sells at least 75% of their product offsite (Brewers Association, 2012).

Brewpub: a restaurant that sells 25% or more of their beer on-site. Where the law allows, brewpubs can offer their beer ‘to-go’ in growlers or kegs to customers (Brewers Association, 2012).

Craft Brewery: a brewery with an all malt flagship or has at least 50% of its volume in all malt beers or beers that use adjuncts to enhance the flavor (rather than lightening it) (Brewers Association, 2012).

Regional brewery: a brewery that produces between 15,000 and 6,000,000 barrels a year. Highland Brewery is the only regional brewery in North Carolina (Brewers Association, 2012).

Macro-brewery or Large-scale brewery: a brewery that produces over 6,000,000 barrels per year. The three main companies considered being large or macro-breweries are MillerCoors, Anheuser-Busch, and Pabst (Brewers Association, 2012).

Malt Beverage: In 2005 there were major changes in the law regarding the production and sales of beer, as well as the North Carolina definition of beer and malt beverages. According to the North Carolina Legislation, “‘malt beverage’ means beer, lager, malt liquor, ale, porter, and any other brewed or fermented beverage containing at least one half of one percent (0.5%), fifteen percent (15%), alcohol by volume.” This is an increase from 6% (North Carolina House Bill 392, 2005).

CHAPTER 2: LITERATURE REVIEW

Breweries are a rapidly growing and important part of the tourism industry in the United States and in North Carolina. Currently, there is little (if any) published research on beer tourism in North Carolina. This study will provide insight as to who is visiting the breweries, why they are choosing one brewery over another, and how breweries can increase their visitation numbers.

The first section of this chapter defines concepts used in the study as they relate to brand loyalty, access to the product and company, environmental consumption, desire for unique consumer products, quality and satisfaction, recreation involvement, and the connection with the local community. Each concept will be discussed as it relates to the research questions in this study.

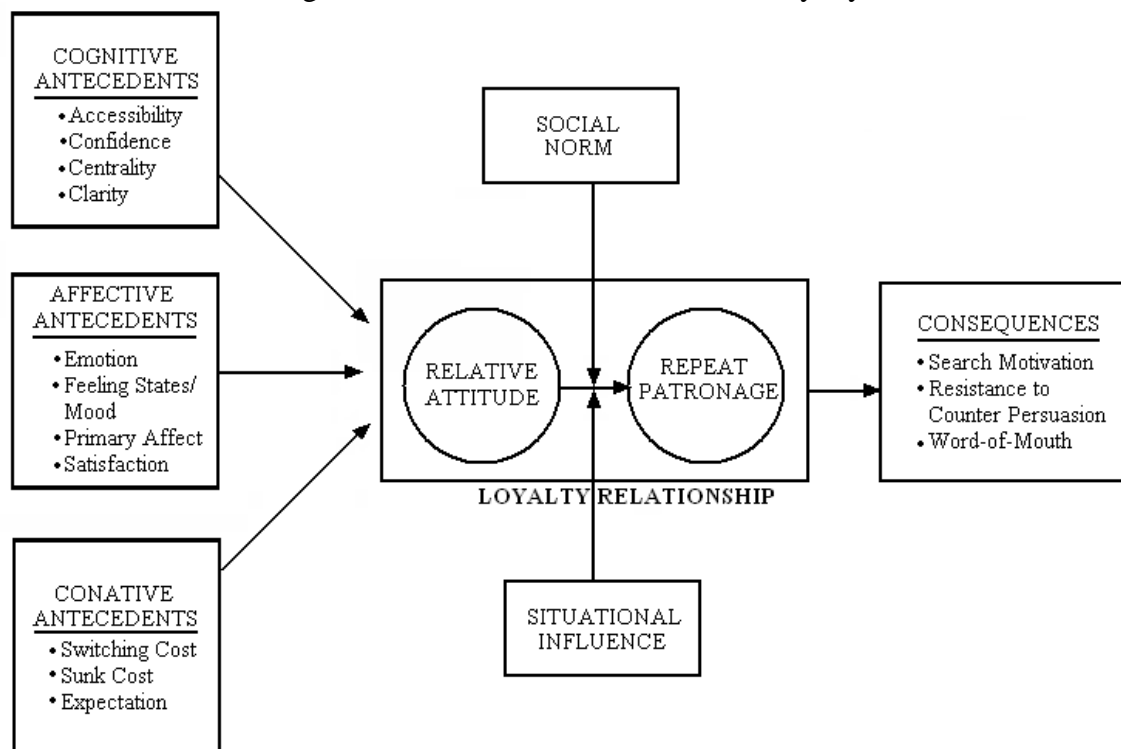
Brand Loyalty

Brand Loyalty is the key concept behind this study. Bloemer and Kasper (1995) define true and spurious brand loyalty. They define true brand loyalty as: “the biased (i.e. non-random) behavioral response (i.e. purchase) expressed over time by some decision making unit with respect to one or more alternative brands out of a set of such brands which is a function of psychological (decision making, evaluative) process resulting in brand commitment” (p. 313). Bloemer and Kasper (1995) also define spurious brand loyalty as: ‘the bias (i.e. non-random) behavioral response (i.e. purchase) expressed over time by some decision-making unit, with respect to one or more alternative brands out of a set of such brands which is a function of inertia” (p.313). Day (1969) suggests that brand loyalty cannot be defined just by the repeat purchasing patterns of one item by one consumer, stating that “these spuriously loyal buyers lack any attachment to brand attributes, and they can be immediately captured by another brand that offers a better deal, a coupon, or enhanced point-of-purchase visibility through displays and

other device” (p. 30). Day (1969) identifies variables for the “true brand-loyal buyer.” These variables include: “consciousness of the need to economize when buying, confidence of their brand judgments, a heavy buyer of the product, and a lack of influence by price fluctuations” (p. 34).

Much research (Day 1969; Jacoby and Chestnut 1978; Dick and Basu 1994) has been done on brand loyalty but the influencing factors are complex and dynamic. Dick and Basu (1994) developed a framework for customer loyalty that identified various antecedents, their influence on relative attitude, and outside influences on repeat patronage. The consequences or results garnered from this framework are the motivation to search for the specific product, resistance to counter persuasion, and marketing through word of mouth. Figure 2.3 shows Dick and Basu’s framework for customer loyalty:

Figure 2.1: A framework for customer loyalty



From Dick, A. S., & Basu, K. (1994)

For the purposes of this study, Dick and Basu's framework will be adapted specifically for true brand loyalty to craft breweries. Cognitive, affective, and cognitive antecedents are all relevant in the case of loyalty to craft breweries. In this study, they will be categorized in the six brand loyalty indicators identified in chapter one.

Brand equity is an important concept when examining brand loyalty. Understanding brand equity is crucial for any business owner or marketing professional. "Brand equity is defined in terms of the marketing effects uniquely attributable to the brand—for example, when certain outcomes result from the marketing of a product or service because of its brand name that would not occur if the same product or service did not have that name" (Keller, 1993, p. 1). Keller (1993) identifies two key reasons for studying brand equity of any organization or business. The first is to determine the value of a brand for financial reasons. The second reason for measuring brand equity is to develop a strategy to improve marketing.

David A. Aakers (1996) discusses the 'Brand Equity Ten,' which are ten measures that aim to evaluate and track brand equity over various markets and products (Figure 2.2).

Figure 2.2 Brand equity ten

<p><u>Loyalty Measures</u></p> <ul style="list-style-type: none"> • Price Premium • Satisfaction/Loyalty
<p><u>Perceived Quality/ Leadership Measures</u></p> <ul style="list-style-type: none"> • Perceived Quality • Leadership
<p><u>Associations/ Differentiation Measures</u></p> <ul style="list-style-type: none"> • Perceived Value • Brand Personality • Organizational Associations
<p><u>Awareness Measures</u></p> <ul style="list-style-type: none"> • Brand Awareness
<p><u>Market Behavior Measures</u></p> <ul style="list-style-type: none"> • Market Share • Price and Distribution Indices

From Aakers, D. (1996).

The 'Brand Equity Ten' is adaptable to the craft brewery industry, but not all measures are applicable to every industry. For the purpose of this study, seven of the ten will be applied, and discussed here. Loyalty measures are described through price premium and satisfaction and loyalty. The price premium refers to the amount of money consumers are willing to pay extra for a specific brand. For example, if Budweiser is \$5.99 for a six-pack and Mother Earth Weeping Willow Wit is \$8.99 for a six-pack, would the consumer be willing to pay the \$3 more for the Mother Earth brand? Is there a price cap for what the consumer would be willing to pay? Satisfaction and loyalty are measured by a general contentment with the product and whether or not they would recommend the product to others (Aakers, 1996). Perceived quality and leadership measurement refers to the position of the brand among competitors. The quality

measurement determines whether it is high, low, or comparable to other brands in the industry. Leadership is indicated by whether or not the brand image is growing. 'Quality' also notes how innovative the organization is and whether or not it is the first in the industry to adapt various practices (Aakers, 1996). The perceived value is whether or not the consumer believes that the brand is a good value for the money and if consumers will purchase that brand over another brand. Personality refers to the personality, image, and "type of person who would use the brand" (Aakers, 1996, p. 118). Organization refers to a group or trade association of which the brand may be a member. In the case of craft breweries in North Carolina, organizations considered could be the North Carolina Brewers Association, Asheville Brewers Guild, or the Brewers Association (Aakers, 1996). Awareness includes the cognizance of the consumer to the brand. In the case of craft breweries, the different beers produced by the brand, opinion about the brand and simply whether or not they have heard of the brand contributes to the consumer's level of awareness (Aakers, 1996, p. 118). Finally, market behavior refers to the market share and price and distribution indices. The market share is the percentage of the customer market that the specific brand represents. Since craft breweries are such a small portion of the brewing industry as a whole, market share should be measured at the craft brewery level rather than the brewing industry as a whole. Price and distribution indices refer to the availability of the product in stores and the access to the product (Aakers, 1996).

The concepts of brand equity and brand loyalty are similar but they are not defined or measured as one concept. As Aakers discussed in this 'Brand Equity Ten,' brand loyalty is a measurement that helps define the brand equity of a company or organization. George S. Day (1969) discussed the difficulty in measuring and defining brand loyalty, and identified two types of brand loyalty: spurious brand loyalty and true brand loyalty. In this study, the concepts of

brand loyalty and brand equity will be explored through examining price, satisfaction, perceived quality, accessibility, and emotion.

Access

The concept and appeal of convenience in consumer product marketing has been used by marketers and market researchers for years. Lew G. Brown (1989) proposed five dimensions of convenience: time, place, acquisition, use, and execution. The time dimension is the idea that the product can be consumed or accessible at a convenient time (not necessarily that they are time-saving). “Products may be provided at a time that is most convenient for the customer” (Brown, 1989, p. 15). The place dimension refers to the convenience of the location of the product. In the case of craft breweries, Mother Earth Brewery is convenient for residents of Kinston and Greenville, North Carolina where Aviator is more convenient for residents of Wake County and more specifically Fuquay-Varina, North Carolina. Place dimension also refers to the convenience or availability of the product in the consumers’ hometown.

The acquisition dimension refers to the ease of actually acquiring the product. “Firms may make it easier for the customer, financially and otherwise, to purchase their products.” (Brown L. G., 1989, p. 15). The use dimension refers to the convenience of the use of the product. Marketing products as ‘easy to use’ or ‘just add water’ market the product as easier to use (Brown L. G., 1989, p. 15). Acquisition and use are not as applicable as the other three dimensions of convenience however breweries offering to sell growlers of beer and selling refills of the growler for less than the original cost allows for easy acquisition of the product. The fifth and final dimension is the execution dimension. The execution dimension refers to someone else providing the product to the consumer. This dimension can be exemplified by buying the product

off the shelf without any recognition of the work that went into the product. "...simply having someone else provide the product for the consumer" (Brown L. G., 1989, p. 16).

Access to the product can also be examined through the accessibility to the company. Accessibility to the company is an important concept for this study because brewery tours and brewpubs allow for consumers to see where their product is being produced. Brewery tours are a convenient activity for visitors and it allows visitors taking the tour to get a more in depth look at company and how it operates. Consumer Experience Tourism is a concept developed by Mark A. Mitchell in 2000 as a way of linking brand bonding to consumer tourism of factories and companies (Mitchell, 2000). Manufacturing plant tours, company museums, and company visitor centers are all examples of ways in which the consumer can get a better understanding of the way companies work. Such tours can be defined as 'manufacturing tourism,' 'industrial' tourism,' and 'industrial heritage tourism.' The large number of craft breweries in the United States allow for the convenience of touring a local brewery and are one of the only types of companies that almost always offers tours. "Further, the recent explosion in the number of smaller breweries and brew pubs seeks to capitalize on the consumer's interest in the manufacturing process and the 'chic-ness' of the consuming on-the-spot made beverages" (Mitchell & Orwig, 2002, p. 32). Offering tours to visitors is a way in which the breweries can provide products to consumers without shipping and production costs while giving them the experience of seeing how beer is produced. This study will look at Consumer Experience Tourism as it relates to beer tourism in North Carolina by surveying visitors who tour breweries. "CET can strengthen the bond between consumers and brands by providing a visual presentation of the brand, its operation, production process, history, and historical significance" (Mitchell & Orwig, 2002, p. 32).

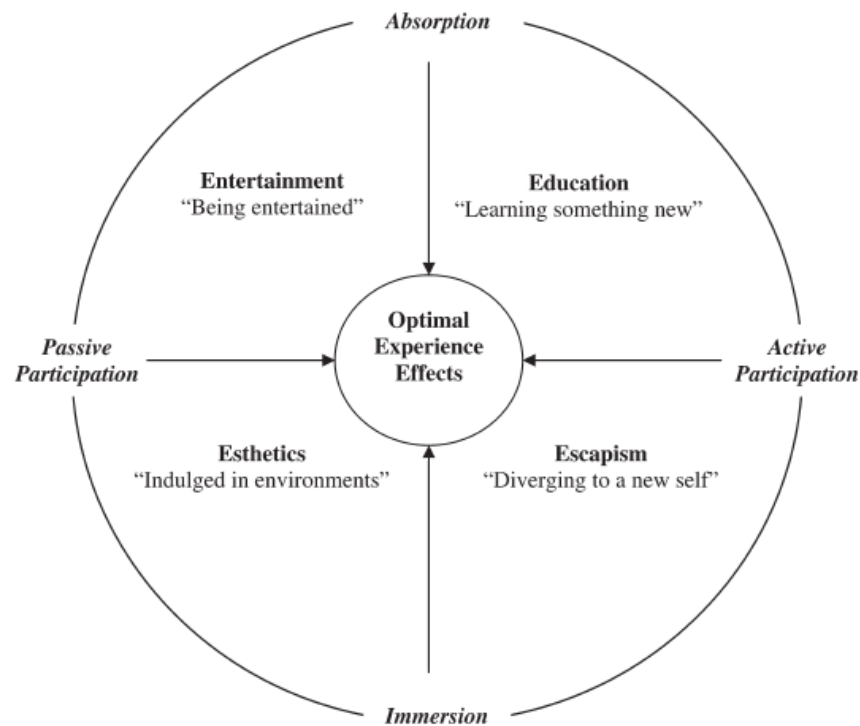
Many researchers have begun looking into the experience economy within the United States (Oh, Fiore, and Jeoung, 2007; Dick & Basu, 1994; Pine, Gilmore, and Conger, 1999). According to Oh, Fiore, and Jeoung (2007, p. 119) “in *experience economy*, consumers seek unique experiences beyond merely consuming products and services because the consistent, high level of product and service quality can no longer be used to differentiate choices for consumers.” The experience economy refers to consumers’ paying for an experience or the service being provided to them. The experience economy can be exemplified by buying a cup of coffee from Starbucks™. Consumers are paying for their cup of coffee as well as the ability to watch their custom cup of coffee being made in front of them.

The experience economy is directly related to tourism and there is much research to support the connection between the two (Oh et al., 2007; Dick & Basu, 1994; Pine et al. 1999). Purchasing trips and visiting sites allows for travelers (or consumers) to engage in activities and experience the place they are visiting. “In essence, what tourists primarily seek and consume at destinations is engaging experiences accompanied by the goods and/or service components of the destinations. Hence, entire tourist destinations are beginning to be positioned as ‘experiences’” (Oh et al., 2007, p. 119). Brewery tours encourage consumers of the product (or people interested in the production of the product) to tour the brewery and intimately experience the inner workings of a craft brewery. The multitude of craft breweries in the country allows for consumers to visit the craft brewery close to their hometown and experience something unique to their town.

Pine et al. (1999) developed the concept of the experience economy and its relationship to tourism in their book *The Experience Economy*, and named four realms of experience: entertainment, education, esthetics, and escapism. Entertainment is essentially being amused,

education experience is about learning something new, esthetics refers to indulgence in environments, and escapism refers to diverging to a new self. Absorption, immersion, and participation (active or passive) all contribute to the overall experience (Figure 2.3).

Figure 2.3: Experience economy



From Pine, et al. (1999).

The experience economy is a driving factor for craft breweries and beer tourism. Craft breweries allow for unique experiences and help businesses make money through the developed connection with the company or organization as well as a connection to place in general.

Environmental Consumption

Environmental consumption is a well-researched concept within tourism and sustainable tourism (Hobson, 2003; Miller, Rathouse, Scarles & Tribe, 2010) and is important to look at

when studying brand loyalty to craft breweries. According to Belz & Peattie (2009, p.78), there are several different types of sustainable consumer:

“Some may favor socially oriented ethical consumption issues such as Fair Trade, while other will favor environmental issues such as organic produce or carbon reduction. Some consumers may have a broad spread of socio-ecological issues to which they respond, while others may feel passionately about very specific issues such as animal cruelty.”

This study focuses on the environmental sustainability in the brewing industry rather than Fair Trade goods. Within the last few decades, Americans have become more conscious of environmental issues. In 2010, 61% of Americans expressed a sympathetic attitude towards the environmental movement (Taylor, Barber, and Deale, 2010). . This has had an effect on consumer lifestyles when purchasing goods (Taylor, Barber, and Deale, 2010). Vermeir and Verbeke (2005, p. 170) note that, “sustainable consumption is based on a decision-making process that takes the consumer’s social responsibility into account in addition to individual needs and wants.”

While the attitudes of Americans favoring the environmental movement have increased, the behaviors have not necessarily followed suit. “Everyday consumption practices are still heavily driven by convenience, habit, value for money, personal health concerns, hedonism, and individual responses to social and institutional norms, and most importantly, they are likely to be resistant to change” according to Vermeir and Verbeke (2005, p. 170) who studied attitude-behavior intention gaps. Attitudes are not an accurate predictor of behavioral intention or marketplace behavior (Kraus, 1995). Price, quality, convenience, and brand familiarity are still the most important criteria when forming a decision in terms of consumption (Vermeir and Verbeke, 2005). This study will look at the environmental consumption of craft beer drinkers and whether or not they choose their beer based on environmental sustainability as much as price, convenience, and quality.

Desire for Unique Consumer Products

The desire for unique consumer products (DUCP) or consumers need for uniqueness (CNFU) concept has been researched by in many fields including marketing, psychology, and sociology. Similar to how neo-localism seeks to create a unique sense of place, CNFU leads consumers to choose products that are rare and help create a unique self-image and social-image (Ruvio Shoham, & Brencic 2008).

Ruvio, Shoham, and Brencic (2008, p. 35-36) identify three dimensions that conceptualize CNFU: creative choice counter-conformity, unpopular choice counter-conformity, and avoidance of similarity; these dimensions were adopted by Ruvio et al. from Tian and McKenzie (2001). Creative choice counter-conformity is the way in which consumers use products to create a unique self-image in a socially acceptable manner (Tian & McKenzie, 2001). Creative choice counter-conformity could be used to explain why consumers choose to drink beers from rural areas like Fuquay Varina and Kinston. Unpopular choice counter-conformity is the how consumers choose products that will intentionally go against the social norm (Tian & McKenzie, 2001). Avoidance of similarity explains how consumers try to purchase goods that are not widely sold (Anheuser Busch and MillerCoors products for example) (Tian & McKenzie, 2001). This final dimension often leads consumers to search for discontinued, scarce, or products otherwise perceived as special or having status.

The wine connoisseur is not a new phenomenon, however, beer connoisseurs have “emerged in tandem with the rise of microbreweries” (Flack, 1997, p. 46). CNFU, as a sociological concept, looks at how consumers feel they define themselves by the products they purchase or consume. Craft breweries allow for consumers to drink a beer unique to the area. Craft brews are also often scarce in regions in the country where the beer is not produced. Flack

(1997, p. 46) states, “as with almost everything in this society of conspicuous consumption, the beer that a person drinks has become a sociological marker or symbol of self-definition.”

Quality and Satisfaction

Understanding the level of perceived quality and satisfaction with the product is generally a key concept when examining brand loyalty. Lockshin and Spawton’s 2001 study on brand loyalty looks at the wine tourism sector and factors that influence brand equity within that industry. Lockshin and Spawton (2001) observed that hundreds of studies state that perceived quality is the most prominent factor related to profitability and return on investment. It is important to understand that perceived quality is not measured by professionals in the specific field (brewers in the beer industry for example) but rather by the perception of quality made by the consumer.

Satisfaction has been studied both in the brand loyalty context (Aakers 1996; Bloemer & Kasper 1995) as well as within leisure and tourism literature (Li & Petrick 2003; Yoon & Uysal 2005). Studies within the leisure and tourism literature attempt to link customer satisfaction with destination loyalty (Li & Petrick, 2005). Quality and satisfaction with both the tour and the product will be measured in this study to understand the satisfaction and perceived quality visitors have with their beer choice as well as their brewery tour choice. The Investment Model described by Li and Petrick (2003) discusses how people are generally seeking to maximize rewards (including satisfaction) and minimize costs. This model looks at satisfaction as a potential measurement of brand loyalty.

Involvement

Looking at the level of involvement when studying perceived quality is also important when trying to understand brand loyalty and factors that influence it. Wine tourism scholars have identified touring wineries as a way for consumers to better understand where their wine is coming from, how it is made, and how they should perceive the quality of it (Lockshin & Spawton, 2001).

Involvement is a prominent concept when looking at brand loyalty and brand equity (Quester & Lim 2003; Li & Petrick 2008; Bloemer & Kasper 1995; Traylor & Joseph 1984). Most literature when discussing involvement will either look at product or purchase involvement (Quester & Lim, 2003). Purchase involvement looks at the level of involvement the purchaser has with the product, for example, tomato sauce would probably have a low purchase involvement whereas a car would have a high purchase involvement. Product involvement however “reflects the perceived relevance of the product category to the individual on an ongoing basis” (Quester & Lim, 2003, p. 24). This study will look at both purchase and product involvement by asking questions related to whether or not they care about what type of beer they buy (purchase involvement) as well as questions regarding their involvement in the brewing industry (product involvement).

Similar to involvement, investment size also studies the amount of personal investment a consumer has in a brand or product. Many times investment is related to monetary investment but some literature (Li & Petrick 2003, Rusbult 1991). According to Li and Petrick (2003) investment is “the technical, financial or psychological factors which make it difficult or expensive for a customer to change brand (p. 26). Li and Petrick (2003, p. 27) also identify various ways in which the recreation, leisure, and tourism field relate to brand loyalty and

investment stating that investment can also be “indicated by equipment owned, organizational membership, emotional attachment, experience, money spent and efforts.” These factors may be translated into beer tourism by brewing equipment owned, membership to various beer tasting groups, for example, Girls Pint Out (a women’s beer tasting group in Raleigh), the Brewer’s Association, or the North Carolina Brewers Guild, or an experience while on a brewery tour.

Involvement is noted in brand loyalty and business literature but it is also notable in the leisure literature (Kyle, Kerstetter & Guadagnolo, 2002; Kyle & Chick, 2002; Iwasaki & Havitz, 2004; Havitz & Dimanche, 1999). According to Kyle and Chick (2002, p. 427),

“Involvement reflects the degree to which a person devotes him or herself to an activity or associated product... Additionally, involvement refers to the strength or extent of the cognitive linkage between the self and stimulus object. This is indicated by expressions stressing the extent of an object’s relatedness, connections or engagement to an individual’s self-concept, needs, and values as determinants of involvement.”

There are several indicators of leisure involvement identified in the literature including “the ability to differentiate between facilities and activity-related equipment, frequency of participation and purchase, the size of consumers’ awareness, and several socio-demographic variables” (Kyle & Chick, 2002, p. 427). Other indicators include sign (what the product or activity says about a person), centrality (social networks that center on the activity), and risk (perceived risk and negative consequences of making a poor choice) (Iwasaki & Havitz, 2004).

Leisure involvement is an important concept to look at when researching tourism behavior and brand loyalty. Repeat patronage of a brewery, home brewing, and social connections around the brewing industry are all related to leisure involvement. When looking at leisure involvement demographics among runners, Kyle, Kerstetter and Guadagnolo (2002) look at several variables to understand involvement including things like “running is pleasurable”, “my participation in running gives a glimpse of the type of person who I am”, and “I get annoyed

if I go running and it proved to be the wrong activity choice” (p. 10). The previous examples suggest how leisure involvement is related to how a person perceives his or herself and relates to the activities they participate in. Visitation to and tours of breweries is an activity for leisure time. What individuals choose to do during that time reflects on how involved they are in the brewing industry. Their loyalty to a particular brewery may be due to the fact that they work in the industry or they spend a lot of time and money brewing or being involved in the brewing process.

Connection with the Local Community

Many breweries use their naming and labeling as a way to create a connection with the local community. This study will examine whether those connections lead to increased brand loyalty for the breweries. There are several concepts and theory that look at the connection with the community and how it relates to tourism. If the connection with the local community is not present, there could potentially be resistance to tourism development. The concepts examined in this study are neo-localism, sense of place, stakeholder theory, and a Tourism Impact Attitude Scale.

James R. Shortridge (1996, p. 38) developed the idea of ‘neo-localism’ as: “deliberate seeking out of regional lore and local attachment by residents (new and old) as a delayed reaction to the destruction in modern America of traditional bonds to community and family.” Schnell and Reese (2003, p.46) suggest that one reason for the rapid increase in the craft brewery movement is “in part from the desire of people to break away from the smothering homogeneity of popular, national culture, and reestablish connections with local communities, settings and economies.” Schnell & Reese (2003) also refer to this movement as neo-localism

Microbreweries are arguably a large part of the neo-local movement (Brewers Association, 2012).

According to Wes Flack: “neo-localism of microbreweries is an intriguing attempt to create a sense of place” (1997, p. 49). Craft breweries often attempt to ingrain themselves into their local community and represent the history and landscapes of the area. A few ways in which breweries attempt to connect their businesses with place and identify with their local surroundings is through the labels, logos, and naming of their beers. Schnell and Reese (2003) cite several categories that brewers use to name their beers including historical life ways, blue-collar lifestyles, sport teams, local characters, local legends, historical events, landmarks, wildlife, and climatic events. Digging up histories of the town and reintroducing local heritage to communities through labeling is just one of the ways in which local businesses are trying to reinvent their local identity. This reinvention is at the heart of neo-localism.

Local identity is rooted in the idea of a ‘sense of place’. When breweries express the history of the town in which they are located, they are identifying with that town and the community’s sense of place. “When we recall places, we recall emotions and activities and not merely the physical setting. The memory of a place becomes a language through which we recall our past social networks and emotions... writing about the past places in their life serves as a form of self-discovery” (Glassberg, 2001, p. 115). Schnell and Reese (2003) argue that the craft beer industry aims to help people revisit their community’s history.

Community support of tourism businesses is necessary for any business to survive. It could be argued that because North Carolina is in the Bible Belt, community support would be a difficult thing for any alcohol producer to achieve. In determining community support it is

important to understand how various stakeholder groups feel about the craft brewery in town and the craft brewery as a tourism business.

Freeman (1984), a pioneer in stakeholder theory, defined stakeholders as “any group or individual who can affect or is affected by the achievement of the organization’s objectives” (p. 46). Donaldson and Preston (1995) later redefined stakeholders by adding the idea of the group or individual having a legitimate interest in the organization (p. 88). Many researchers have adopted stakeholder theory for different businesses and organizations.

Sautter and Leisen (1999) discuss the necessity of stakeholders and how to manage them. They identify eight different types of stakeholders as a starting point for identifying stakeholders in the community while planning for tourism. These stakeholders are local businesses, employees, government, competitors, residents, national business chains, tourists, and activist groups (Sautter & Leisen, 1999). Tourism planners as (including tourism entrepreneurs) use stakeholder theory to develop tourism development strategic plans. Sautter and Leisen (1999) state “this theory submits it is the responsibility of managers, and the management function, to holder groups, without giving priority to one stakeholder’s interests over another” (p. 314).

Input in tourism plans allows for community support for development. A lack of input from stakeholders could lead to animosity towards tourism. Including the stakeholders’ opinions during the development phases are not enough; the implementation of ideas and opinions is necessary for the success of any tourism business. Related to stakeholder theory, the concept of “distance decay” has been heavily researched by geographers as a way of examining behavior and attitudes towards recreation, crime (Rengert, Piquero, & Jones 1999), and tourism (McKercher & Lew 2003). Distance decay theory is a way in which researchers can explain increase and decrease of the level of support as subjects are physically farther from the

destination being studied. The farther away from Philadelphia people live, the less likely they are to be a Philadelphia Seventy Sixers or a Philadelphia Phillies fan. Similarly, residents of counties in the mountains of North Carolina may not be as involved in the breweries of eastern North Carolina because they live so far away.

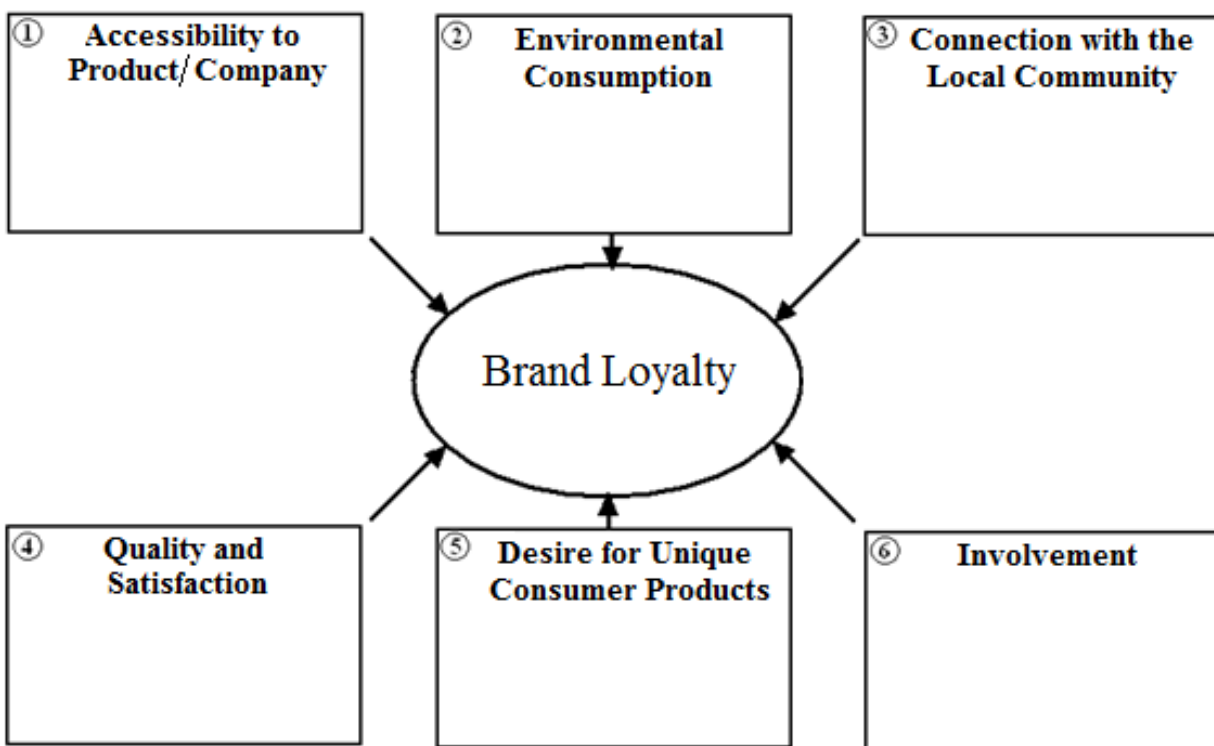
Distance decay theory is linked to tourism “Because the act of traveling requires an investment of time, money, or effort resulting in a trade-off being made between travel time and time spent at the end destination, as distance increases, demand will decline exponentially” (McKercher & Lew, 2003, p. 159).

The Tourism Impact Attitude Scale is a popular tool used by tourism researchers to determine the level of support a community has on the impact tourism has in their community. Researchers have discovered several benefits to tourism as well as several detriments to tourism. One of the negative impacts to tourism is the impact to the host community’s life. “[Tourism’s] development is usually justified on the basis of economic benefit and challenged on the grounds of social, cultural, or environmental destruction” (Lankford & Howard, 1994, p. 122).

A few questions in the survey for this study will be adapted from Tourism Impact Attitude Scales. Those questions will measure if loyalty is related to the economic impact breweries have on their town and how far they live from the brewery. The purpose of a Tourism Impact Attitude Scale is to study the local community’s perception of tourism and its impacts and to use that information to help governments gain resident support for tourism development (Lankford & Howard, 1994). Several independent variables have been identified and tested in various research studies including: length of residence, economic dependency on tourism, distance of tourism center from the respondents’ home, resident involvement in tourism decision making, birthplace, level of knowledge, level of contact with tourists, demographic

characteristics, perceived impacts on local outdoor recreation opportunities, and rate of community growth (Lankford & Howard, 1994).

Based on the literature review, six major indicators emerged as ways to measure and study brand loyalty. These factors are 1) access, 2) environmental consumption, 3) connection with the local community, 4) desire for unique consumer products, 5) quality and satisfaction, and 6) involvement.



CHAPTER 3: METHODS

Study Area

This study focuses on two breweries both located in less developed or rural areas. The reasoning for choosing breweries in less affluent areas is to try to capture more consumers that had to travel to the breweries and because the breweries serve as economic drivers in the towns. Mother Earth Brewery is located in Kinston, North Carolina. Kinston (population 22,000) is the county seat of Lenoir County (population 58,000) (2010 United States Census). While the towns are similar in size, Kinston's population decreased from 2000 to 2010 by 8.5% whereas Fuquay-Varina's population has increased 127.1% from 2000 to 2010. The North Carolina Rural Economic Development Center, Inc. considers Lenoir County one of the rural counties in North Carolina. For population and income information on both counties, refer to Table 3.1 (2010 United States Census):

Table 3.1: Study area population and average annual income

	Kinston	Fuquay-Varina	North Carolina
Population of town	22,000	18,000	9,656,401
Population of county	59,495	900,993	N/A
Average Annual Income (city)	\$17,907	\$25,154	\$24,745

Aviator Brewery is located in Fuquay-Varina, North Carolina within Wake County. According to the 2010 census there are just under 18,000 people living in Fuquay-Varina, however, Wake County as a whole inhabits just fewer than 830,000 people (North Carolina Quick Facts from the U.S. Census Bureau, 2012). Residents of Fuquay-Varina on average make \$10,000 less per year than other Wake County residents however there has been a recent increase in the population of Fuquay-Varina due to its convenient location to Research Triangle Park (which could increase the average per capita income).

Sample Definition and Data Collection

The purpose of this study is to examine what influences brand loyalty to craft breweries from both visitors to and residents of the host community. Visitors to the brewery were considered as anyone who took the free public tour offered by Mother Earth Brewery or Aviator Brewery. The data collected from visitors to the brewery were collected using an online survey solicited via email within a week within the visitor takes the tour. Due to the relaxed environment of a craft brewery, and alcohol consumption during tours, online surveys were used to yield a more reliable response.

Mother Earth brewery gives tours of their facilities the first and third Saturday of each month at four different times (totaling eight tours a month). There is also a tap room (a bar that generally only serves beer from the brewery but does not serve food) onsite that is open every Thursday and Friday. After each tour, the employee leading the tour mentioned the survey and the incentive for taking the survey, and collected the email addresses from people taking the tour who agreed to take the online survey. The researcher collected the email addresses from the brewery after each tour and sent visitors the survey solicitation in an email. One week after initial contact, a follow up reminder email was sent.

Aviator brewery offers tours three days a week every week (except during some holidays):

Table 3.2: Schedule of tours at targeted breweries

	Aviator Brewery Tours	Aviator Taproom	Mother Earth Brewery Tours	Mother Earth Taproom
Sunday	None	Open 12pm- 12am	None	Closed
Monday	None	Open 3pm- 12am	None	Closed
Tuesday	None	Open 3pm- 12am	None	Closed
Wednesday	None	Open 3pm- 12am	None	Open 4pm- 10pm
Thursday	One tour	Open 3pm- 12am	None	Open 4pm- 10pm
Friday	One tour	Open 3pm- 12am	None	Open 4pm- 10pm
Saturday	One tour every hour until everyone who wants a tour has received one	Open 12pm- 12am	Four tours starting every hour on the hour from 1pm-4pm	Open 1pm- 6pm

Aviator brewery also has a restaurant and a taproom in their facilities for visitors to eat and purchase crafted beer. Similar to Mother Earth brewery, email addresses were collected after brewery tours and the researcher sent out the survey electronically to each of the willing participants. One week after initial contact, a follow up email was sent out reminding visitors of the survey. The incentive to each of the breweries was offered at the end of the six week study period (March 31 to April 28, 2012) . The targeted collection threshold was 150 responses from each of the breweries however 113 were collected from Mother Earth Brewery and 153 were collected from Aviator Brewery.

Survey Development

The instrument used for this study was built by adapting concepts and survey instruments from previous research. The six factors examined in this study were determined based upon repeating ideas appearing in brand loyalty literature. The six factors are: 1) accessibility to the

product and to the company, 2) environmental consumption, 3) connection with the local community, 4) desire for unique consumer products, 5) quality and satisfaction, and 6) a person's involvement in the industry. This study was piloted for one week to experts in the brewing and tourism fields to understand what kind of results they might yield and to also test for readability and length of the survey.

Brand Loyalty

Brand loyalty is the primary concept researched in this study. The question related to loyalty, adapted from Bloemer and Kasper (1995), focuses on how far a consumer is willing to go to buy their specific brand or if they still choose their brand when an alternative is available for a cheaper price. Additionally, a second question used to measure brand loyalty was added "Overall I consider myself loyal to the Mother Earth/Aviator brand" (Table 3.3).

Table 3.3: Survey items related to *Loyalty*

Original Item	Research Question	Source	Adapted Question
When another brand is on sale, I will generally purchase it rather than my usual brand of blank audio cassettes	Loyalty	Bloemer & Kastle	When shopping at a grocery store, I will generally purchase Mother Earth/ Aviator regardless of whether another brand is on sale

Access

The first factor, accessibility to product and the price of the product, appeared in Bloemer and Kasper's (1995) article, which discusses the relationship between brand loyalty and customer satisfaction. Bloemer and Kastle offer a model to use when researching brand loyalty and consumer satisfaction. The first two questions of the survey examine the brand loyalty according to the price of the product or the price of a competing brand selling a similar product.

Secondly, accessibility to product is measured by the concept of Consumer Experience Tourism identified by Mitchell (2002). The third and fourth questions address the accessibility to the product through brewery tours. Access to the product and the organization is made more convenient through the close proximity of the brewery and regularly scheduled brewery tours.

Accessibility to the company is most prevalent in Mitchell's (2002) concept of Consumer Experience Tourism. Consumer Experience Tourism discusses the increased (or decreased) level of support in a company and its products based on a tour of that company. Access to the company could help to establish some trust in the organization by the community. Similarly, seeing the brewing process and help consumers understand the brewing process and their connection to the brewery.

Table 3.4: Survey items related to *Access*

Original Item	Research Question	Source	Adapted Question
Plant tours establish trust and understanding within the supply chain	Access	Mitchell & Orwig	Consumers who visit breweries have a better understanding about the product
Consumers increase their knowledge of (and establish closer bonds) with both familiar and not-so familiar brands	Access	Mitchell & Orwig	Consumers increase their knowledge of the brewing process through brewery tours
Consumer Experience Tourism can strengthen the bond between consumers and brands by providing a visual presentation of the brand, its operation, production process, history, and historical significance	Access	Mitchell & Orwig	The tours at the brewery help to establish a customer bond with the brand

Environmental Consumption

As the interest in sustainability in the United States has rapidly grown over the past decade it is important to understand the demand for environmentally sustainable products in all market sectors including breweries. To keep within the academic focus of culinary tourism, questions about environmental consumption related to wine tourism were adapted from Barber, Taylor, and Deale's (2010) study on environmental attitudes and wine tourism. Similarly, Park and Boo's (2009) study on convention tourism and sustainability focused on environmental attitudes. The question about sustainable branding and image were adapted from Park and Boo.

Table 3.5: Survey items related to *Environmental Consumption*

Original Item	Research Question	Source	Adapted Question
I would pay an extra 'environmental fee' for tasting wine at the winery	Environment	Barber, Taylor, and Deale	I would pay more for a beer that is produced in an environmentally friendly manner
Wine tourism must protect the natural and cultural environment	Environment	Barber, Taylor, and Deale	Breweries should take measures to lessen their impact on the natural environment
I would switch from my usual wine brand and buy environmentally safe wine even if I have to give up some quality	Environment	Barber, Taylor, and Deale	If the price were the same, I would switch from my usual beer brand to an environmentally friendly beer option
I would switch from my usual wine brand and buy environmentally safe wine even if I have to give up some quality	Environment	Barber, Taylor, and Deale	If the price were 10% more expensive, I would switch from my usual beer brand to an environmentally friendly beer option
Green practices enhance the image and brand of the convention and sponsor organizations	Environment	Park and Boo	Green practices enhance the image and brand of the brewery

Connection with the Local Community

Schnell and Reese (2003) identified microbreweries as a way in which communities are creating and reaffirming their local identity. Craft breweries represent their local community's culture through their labels and beer names. This study aims to find out if that connection with the local culture is a driving force for the community's support and if it is a factor for visitors' loyalty to the brand. Questions regarding culture, history, and social benefits were adapted from various tourism impact attitude scale studies (Kang, Long, & Perdue, 1996; Brehm, Eisenhauer & Krannich, 2004). Brehm, Eisenhauer, and Krannich (2004) discuss the promotion of the local culture and its traditions, while Kang, Long, and Perdue (1996) discuss the social benefits of tourism. A third item was developed as an adaptation of Mitchell's concept of Consumer Experience Tourism. These questions will identify the amount of history and historical significance visitors learn about the brewery while on a brewery tour.

The concept that the economic impact on a region brings brand loyalty comes from the tourism impact attitude scale. While spending money locally is important to many visitors who participate in sustainable tourism, it is very important for fostering a positive attitude towards tourism for residents. If residents understand that money spent at the craft brewery or money spent on beer outside of Kinston or Fuquay-Varina brings in money to those communities, they may be more likely to support craft breweries.

Table 3.6: Survey items related to *Connection with the Local Community*

Original Item	Research Question	Source	Adapted Question
Manufacturing plant tours, company museums, and company visitor centers have become a convenient entertainment option for families, community groups, business travelers, and others	Community	Mitchell & Orwig	Brewery tours provide an added recreational activity for the community
Manufacturing plant tours, company museums, and company visitor centers have become a convenient entertainment option for families, community groups, business travelers, and others	Community	Mitchell & Orwig	Brewery tours are a low-cost entertainment option for community groups, business travelers, groups of friends, and others
A tour of the brewery can strengthen the visitor's bond with the brewery by learning about its history and historical significance	Community		Brewery tours educate visitors about aspects of Kinston's history
Tourism promotes the local culture and its traditions	Community	Brehm, Eisenhauer, and Krannich	The brewery celebrates the local culture and traditions of Kinston through its products and events
I personally receive <i>social</i> benefits from having a casino in town (improved quality of life, meeting interesting people, and personal satisfaction)	Community	Kang, Long, and Perdue	I personally receive social benefits from the brewery (improved quality of life, meeting interesting people, and adding vibrancy to the area)
Birthplace in the study region	Community	Bachleitner & Zins	Birthplace in the study region
Tourism provides economic opportunities for members of the community	Community	Brehm, Eisenhauer, and Krannich	The brewery provides economic benefits to the community (income, employment, taxes)
Wine tourism impacts surrounding communities located near the region	Community	Barber, Taylor, and Deale	The brewery has had a positive impact on the tourism industry in the town
Tourism attracts more economic investments and	Community	Brida, Osti, Faccioli	Visitors to the brewery also spend money at other local

spendings			businesses
Because of gambling more tourists come to this town	Community	Kang, Long, and Perdue	The additional tourists that the brewery attracts positively impacts the town

Desire for Unique Consumer Products

Craft breweries are a way for consumers to break away from drinking beers produced by major industrial breweries. For the purpose of this study it is important to understand that craft breweries small businesses that each offer unique products. The desire for unique consumer products is applied in this study to see if consumers enjoy drinking a brand they do not regularly have access to or if they want to try a new beer when it first comes out in the market. Lynn and Harris (1997) developed several questions used to identify consumers' desire for unique consumer products according to fashion. Those questions were adapted for craft beer consumption.

Table 3.7: Survey items related to *Desire for Unique Consumer Products*

Original Item	Research Question	Source	Adapted Question
I tend to be a fashion leader rather than a fashion follower.	Uniqueness	Lynn & Harris	I tend to be a fashion leader rather than a fashion follower in what I eat and drink
I would prefer to have things custom-made than to have them ready-made.	Uniqueness	Lynn & Harris	I would prefer to have craft beer rather than a beer from a large-scale brewery
I rarely pass up the opportunity to order custom features on the products I buy.	Uniqueness	Lynn & Harris	When I travel, I like to buy the local craft beer
I rarely pass up the opportunity to order custom features on the products I buy.	Uniqueness	Lynn & Harris	When ordering beer at a restaurant or bar, I rarely pass up the opportunity to drink a craft beer
I like to try new products and services before others do.	Uniqueness	Lynn & Harris	I like to be one of the first to try a newly released or seasonal beer
I enjoy shopping at stores that carry merchandise that is different and unusual.	Uniqueness	Lynn & Harris	I enjoy buying beers that are unique

Satisfaction

The concept of quality and satisfaction occurs in much of the literature on brand loyalty (Bloemer and Kasper (1995); Selnes (1993); Day (1969); Jacoby and Chestnut (1978); Dick and Basu (1994)). For the purpose of this study quality and satisfaction will be measured by how consumers discuss the beer and by the quality of the tours provided by Mother Earth Brewery and Aviator Brewery.

Table 3.8: Survey items related to *Satisfaction*

Original Item	Research Question	Source	Adapted Question
On a scale from 1 to 10, how close do you think XYZ is delivering products/services of an optimal company?	Satisfaction	Selnes	How satisfied were you with the tour at the brewery?
On a scale from 1 to 10, how close do you think XYZ is delivering products/services of an optimal company?	Satisfaction	Selnes	How satisfied were you with the overall taproom?
What is your overall satisfaction with company XYZ?	Satisfaction	Selnes	How satisfied were you with the beer itself?

Involvement

Involvement in the industry could also be seen as perceived personal importance.

“Involvement is activated when a product, service, or promotional message is perceived as instrumental in meeting important needs, goals, and values... Involvement influences the extensiveness of information search, the length of the decision-making process, formation of beliefs, attitudes, and intentions, as well as behavioral outcomes, such as variety seeking behavior, brand-switching behavior, brand-commitment or loyalty, frequency of product usage, and shopping enjoyment” (Vermeir and Verbeke, 2005, p. 174).

Understanding how long people have consumed beer, how long they have consumed craft beer, whether or not they brew their own beer, and whether or not they are employed in the brewing industry is important when analyzing the results of the study. Similarly, residents in the community who consume beer and enjoy the products from the brewery may be more supportive of the brewery in town. Questions were adapted from Barber, Taylor, and Deale’s (2010) study on wine tourism, Bachleitner and Zins’s 2009 tourism impact attitude study, and Bloemer and

Kasper's 1995 study on brand loyalty. However, the main item that was used to measure involvement was: On a scale of 1-5, 1 being 'not at all' and 5 being 'very much so', would you consider yourself a beer enthusiast?

Table 3.9: Survey items related to *Involvement*

Original Item	Research Question	Source	Adapted Question
How long have you consumed wine?	Involvement	Barber, Taylor, and Deale	How long have you enjoyed consuming beer?
How long have you consumed wine?	Involvement	Barber, Taylor, and Deale	How long have you enjoyed consuming craft beer?
Distance to the tourism center	Involvement	Bachleitner & Zins	Zip Code

In addition to questions regarding the six factors, other socio-demographic questions (residence, gender, work sector, age, birthplace, race, education, and income), were asked to determine a profile of the respondents. A few other questions were incorporated related to their visit to the area. These questions explored the primary reason for their visit to Kinston or Fuquay-Varina and how often they visit the brewery. Additionally, questions about what they purchased and how their visit may (or may not) influence future purchases were also included. Finally, the questionnaire included few open-ended questions about their perceptions of the brewery and what works come to mind when they think about the brewery.

Pilot Test

In order to create a quality survey instrument the survey was piloted with an expert panel including faculty from East Carolina University's Center for Sustainable Tourism, other professors with published research in related topics, and professionals in the brewing industry (Table 3.10). The responses and edits to the survey were taken into consideration and used to create the final instrument used to collect data.

Table 3.10: Expert panel for pilot test

Name	Position	Workplace
Dr. Al Duncan	Assistant Professor	Department of Languages and Literature, University of Utah
Dr. Gene Brothers	Assistant Professor	Department of Parks, Recreation, and Tourism Management, North Carolina State University
Dr. Huili Hao	Researcher	Center for Sustainable Tourism, East Carolina University
Dr. Jay Oliver	Assistant Professor	College of Business, East Carolina University
Dr. Pat Long	Director	Center for Sustainable Tourism, East Carolina University
Dr. Steven Schnell	Professor	Department of Geography, Kutztown University of Pennsylvania
Mr. Gerry Sigmon	Distributor	Highland Brewing Company
Mr. Sean Wilson	Owner	Fullsteam Brewery
Mr. Tim Wadkins	Director of Quality Control	Big Boss Brewing Company
Mr. Win Bassett	Executive Director	North Carolina Brewer's Guild

Analysis

The first type of analysis completed was the Cronbach's alpha measure of reliability to see how each of the questions "hung together" within each factor cluster. The seven elements that were examined in the survey are: *Brand Loyalty*, *Involvement*, *Access*, *Environmental Consumption*, *Connection with the Local Community*, *Desire for Unique Consumer Products*, and *Satisfaction*, however *Brand Loyalty* and *Involvement* were each measured with just one survey item. Each of the items was measured on a five-point Likert scale. Inter-item correlation and covariance matrices were also generated to see which items correlated well and which ones were redundant. Each factor was tested for reliability using Cronbach's coefficient alpha (Cronbach, 1951), and all were found to have coefficients of .629 or above.

Secondly, the main research question was investigated using multiple regression. By using the means determined in the first test, multiple regression will reveal how the factors are correlated and which ones most influence brand loyalty to craft breweries.

Finally, the second research question regarding differences among socio-demographics within the six factors was addressed. The dichotomous demographics were analyzed using Mann-Whitney U test and demographics with more than one variable were analyzed using a Kurskal-Wallis test. Where normality was not met, a Mann Whitney U test was run to determine if there are differences in preferences between the two breweries. Specifically, this analysis tested if respondents to the Mother Earth survey answered differently in regards to each of the factors.

CHAPTER 4: RESULTS

Introduction

The results of this study are presented in five different sections followed by a summary. The first section explores socio-demographics of the study sample. The second section discusses the reliability test for each loyalty-influencing factor while the third section aims to answer the main research question, which factor(s) most influence brand loyalty. The fourth section explores differences between groups using the influencing factors as the dependent variables. Finally, the fifth section explores how the respondents of each brewery differ in what influences their brand loyalty.

After six weeks of data collection, 260 usable surveys were amassed resulting in a 63.7% response rate between the two breweries (Table 4.1). Below, the results from the sample are grouped in three ways: respondents from Mother Earth Brewing Company, Aviator Brewing Company, and responses from both breweries combined.

Table 4.1: Data collection dates and numbers

	Mother Earth	Aviator	Total
Total days collecting	8	7	15
Total tour days	3	2	5
Total emails collected	191	224	415
Total surveys collected	113	153	266
Response Rate	59.2%	68.3%	63.7%

Sample Profile

A profile of the sample was created to determine the distribution of the socio-demographic variables (Table 4.2). The majority of respondents were between the ages of 21 and 30 (41.9%), male (59.4%), and Caucasian (97.3%). The majority of respondents were well

educated holding a Bachelor's degree or higher (79.5%). Work sector was also examined with the majority of respondents being employed in the private sector (48.5%). Income was normally distributed with the majority of respondents making between \$60,000 and \$89,000 annually (26.2%).

Table 4.2: Socio-demographic profile of sample

Variables	Aviator Totals	Mother Earth Totals	Combined Data Totals
Gender			
Male	85 (14.2%)	70 (61.9%)	155 (59.6%)
Female	62 (41.9%)	43 (38.1%)	105 (40.4%)
Work Sector			
Public	52 (35.4%)	0 (0%)	52 (20%)
Private	50 (34%)	76 (67.3%)	126 (48.5%)
Non-profit	9 (6.1%)	5 (4.4%)	14 (5.4%)
Own business	10 (6.8%)	10 (8.8%)	20 (7.7%)
Retired	7 (4.8%)	2 (1.8%)	9 (3.5%)
Student	15 (10.2%)	17 (15%)	32 (12.3%)
Unemployed	4 (2.7%)	3 (2.7%)	7 (2.7%)
Age			
21 - 30 years old	55 (37.4%)	54 (47.8%)	109 (41.9%)
31 - 40 years old	36 (24.5%)	31 (27.4%)	67 (25.8%)
41 - 50 years old	28 (19%)	14 (12.4%)	42 (16.2%)
51 - 60 years old	20 (13.6%)	9 (7.9%)	29 (11.2%)
61 - 70 years old	8 (5.4%)	3 (2.7%)	11 (4.2%)
Over 70 years old	0 (0%)	2 (1.8%)	2 (0.8%)
Race/ Ethnicity			
White	146 (98.6%)	107 (93.8%)	253 (97.3%)
Black	1 (0.7%)	4 (3.6%)	5 (1.9%)
Asian	0 (0%)	1 (1%)	1 (0.4%)
Native Hawaiian or Other Pacific Islander	0 (0%)	0 (0%)	0 (0%)
Hispanic	1 (0%)	0 (0%)	1 (0.4%)
Education			
High School	8 (5.4%)	17 (15.2%)	25 (9.7%)
Technical School	8 (5.4%)	3 (2.7%)	11 (4.2%)
Community College	11 (7.5%)	6 (5.4%)	17 (6.6%)
4-Year College or University	92 (65.2%)	60 (53.6%)	152 (58.7%)
Advanced Degree	28 (19%)	26 (23.2%)	54 (20.8%)
Income			
Less than 30,000	19 (12.9%)	30 (26.5%)	49 (18.8%)
30,000 - 59,000	32 (21.8%)	22 (19.5%)	54 (20.8%)
60,000 - 89,000	36 (24.5%)	32 (28.3%)	68 (26.2%)
90,000 - 120,000	26 (17.7%)	11 (9.7%)	37 (14.2%)
More than 120,000	34 (23.1%)	18 (15.9%)	52 (20%)

Residency in the town of the brewery was examined to determine how many respondents were tourists (Table 4.3). Of the 261 respondents, 19.5% were residents of either Kinston or Fuquay-Varina, making 80.5% of the respondents visitors to the city.

Table 4.3: Residence frequencies

Residence	Kinston	Fuquay-Varina	Total
Resident	30 (26.5%)	21 (14.3%)	51 (19.6%)
Visitor	83 (73.5%)	126 (85.7%)	209(80.4%)
Total	113 (100%)	147 (100%)	260 (100%)

Birthplace was examined to see if birthplace in the region affected loyalty to the brewery (Table 4.4). Of the 258 respondents, 8.5% were born in the study regions and 91.5% were born outside the study regions. Fuquay-Varina was established in 1963 as a combination of the cities Fuquay Springs and Varina therefore, Fuquay Springs, Varina, and Fuquay-Varina were all considered when searching for birthplace.

Table 4.4: Birthplace frequencies

Birthplace	Kinston	Fuquay-Varina	Total
Resident	22 (19.8%)	0 (0%)	22 (8.5%)
Visitor	89 (80.2%)	147 (100%)	236 (91.5%)
Total	111 (100%)	147 (100%)	258 (100%)

Examining the Reliability within each Loyalty Factor

The survey instrument outlined twenty-eight items within seven factors (*Brand Loyalty, Involvement, Access, Environmental Consumption, Connection with the Local Community, Desire for Unique Consumer Products, and Satisfaction*). All of the items were found to be reliable measures through previous studies and were adapted to fit this study. Each item was measured a five-point Likert scale, in addition to an option of *Not Sure or Not Applicable*. Depending on the focus of the question, the Likert scale was structured in one of three ways: 1 being *Strongly Disagree* and 5 being *Strongly Agree*; 1 being *Strongly Dissatisfied* and 5 being *Very Satisfied*; or 1 being *Not at All* and 5 being *Very Much So*.

A reliability test was run on the five factors *Access, Environmental Consumption, Connection with the Local Community, Desire for Unique Consumer Products, and Satisfaction*, within the three data sets (Aviator Brewing, Mother Earth Brewing, and the combined dataset). When necessary, an item was removed due to a low correlation or because of redundancy with another item (Table 4.5).

Table 4.5: Cronbach's Alpha based on standardized results for itemized loyalty factors

	Aviator	Mother Earth	Combined Data
Access	.705	.819	.791
Consumers who visit breweries have a better understanding of the product.			
Consumers increase their knowledge of the brewing process through brewery tours.			
Brewery tours help to establish a customer bond with the brand.			
Environmental Consumption	.786	.792	.825
Brewery tours help to explain the brewery's environmental/green operations. ^a			
Breweries should take measures to lessen their impact on the natural environment.			
If the price were the same, I would switch from my usual beer brand to an environmentally friendly beer option. ^{a, b, c}			
If the price were 10% more, I would switch from my usual beer brand to an environmentally friendly beer option.			
Green practices enhance the image and brand of the brewery.			
Connection with the Community	.859	.881	.858
Brewery tours provide an added recreational activity for the community. ^a			
Brewery tours educate visitors about aspects of the local community's history. ^{a, b, c}			
Breweries celebrate the local culture and traditions of the local community through their products and events. ^a			
I personally receive social benefits from the brewery in town (improved quality of life, meeting interesting people, and adding vibrancy to the local community).			
Brewery tours are a low-cost entertainment option for community groups, business travelers, groups of friends, and others.			
Breweries provides economic benefits to the local community (income, employment, taxes)			
The additional tourists that breweries bring in positively impacts the local community. ^{b, c}			
Visitors to breweries also spend money at other local businesses.			
Breweries have a positive impact on tourism in the local community.			
Desire for Unique Consumer Products	.825	.875	.805
I tend to be a fashion leader rather than a fashion follower in what I eat and drink. ^b			
When I am on vacation, I like to buy the local beer.			

I would prefer to have craft brew rather than a mass-produced beer.
 When ordering beer at a restaurant or bar, I rarely pass up the opportunity to drink a
 microbrew. ^{a, c}
 I like to be one of the first to try a newly released or seasonal beer.
 I enjoy buying beers that are unique. ^{a, c}

Satisfaction	.629	.691	.686
How satisfied were you with the brewery tour? ^a			
How satisfied were you with the overall taproom?			
How satisfied were you with the beer itself?			

Note: ^a = Item removed from Aviator data due to very high or very low correlation; ^b = Item removed from Mother Earth data due to very high or very low correlation; ^c = Item removed from combined data set due to very high or very low correlation

Access

Within the Aviator data, the *Access* category was tested for reliability using Cronbach's coefficient alpha (Cronbach, 1951), and was found to have coefficients of .705 (Table 4.5). The inter-item correlations ranged between .309 and .674. In the Mother Earth data, Cronbach's alpha for the three items was $\alpha = .819$. The inter-item correlations ranged between .507 and .765. For the combined data, the reliability coefficient for the three items was $\alpha = .791$. The inter-item correlations ranged between .477 and .711.

Environmental Consumption

Environmental consumption was measured using five items. Within the Aviator data, the five items were found to be reliable ($\alpha = .755$). The inter-item correlations ranged between .059 and .827. One item (*Tours explain environmental practices*) was removed because it had a weak correlation with the other four items. Two additional survey items (both regarding switching brands for a more environmentally-friendly brand) were correlated at .827; therefore, the third item was removed and generated a new Cronbach's alpha coefficient of $\alpha = .786$. The new inter-item correlations ranged between .463 and .602.

Mother Earth's data provided a reliability coefficient of $\alpha = .852$. The inter-item correlations ranged between .314 and .783. The two items regarding switching brands for a more environmentally friendly brand) were correlated at .783, therefore the *If the price were the same, I would switch to an environmentally friendly option* item was removed the new coefficient was $\alpha = .792$ and the new inter-item correlations ranged between .378 and .611.

The combined data set yielded a Cronbach's alpha reliability coefficient of $\alpha = .821$. The inter-item correlations ranged between .157 and .789. Again, the *If the price were the same, I*

would switch to an environmentally friendly option item was also removed, yielding a Cronbach's Alpha score of $\alpha = .825$ and inter-item correlations ranged between .526 and .640.

Connection with the Community

Within the Aviator data, the *Connection with the Community* category was tested for reliability using Cronbach's coefficient alpha (Cronbach, 1951), and was found to have reliability coefficients of .833 (Table 4.6). The inter-item correlations ranged between .127 and .709. To strengthen the reliability, the first item (*Tours as recreation for the community*) was removed due to a low correlation with seven of the other items. Also, the second item (*Tours educate visitors about local history*) was removed because of low correlations with three of the other items. The third item that was removed (*Celebrates local culture and traditions*) had a low correlation with seven of the other items. The new reliability coefficient, after removing the three items, was .859. The inter-item correlations ranged between .347 and .708.

Within Mother Earth's data Cronbach's alpha test for the nine items was found to be reliable ($\alpha = .915$). The inter-item correlations ranged between .253 and .775. The second (*Tours educate about local history*) and the seventh items (*Tourists positively impact Kinston*) were removed due to a low correlation with one item and high correlation with one item. This yielded a new reliability coefficient of .881. The inter-item correlations ranged between .301 and .674.

The Cronbach's alpha for the nine items in the combined data set was found to be reliable ($\alpha = .885$). The inter-item correlations ranged between .210 and .800. The second item (*Tours educate visitors about history*) was removed due to a low correlation with two of the other items. Also, the seventh item was removed (*Tourists positively impact the local community*) because of

high correlation with one item. The new reliability coefficient, after removing the two items, was .858. The inter-item correlations ranged between .312 and .656.

Desire for Unique Consumer Products

Within the Aviator data, the *Desire for unique consumer products* category was tested for reliability using Cronbach's coefficient alpha (Cronbach, 1951), and was found to have a reliability coefficient of .909 (Table 4.5) with inter-item correlations ranging from .276 to .815. Two items low inter-item correlation were removed (*Enjoy unique beers* and *Order craft beers at restaurants*). *Order craft beers at restaurants* had a low correlation with one item and a high correlation with four items. *Enjoy unique beers* had a very high correlation with four items.

Within the Mother Earth data, Cronbach's alpha reliability coefficient for the six items was .858 with inter-item correlations ranging from .236 to .675. One item was removed (*Fashion leader in food and drink*) because of low correlations with three items. The new reliability coefficient is .875 with inter-item correlations ranging from .376 and .669.

The combined data showed Cronbach's alpha for the six items was .891 with inter-item correlations ranging from .342 to .729. Two items were removed due to high inter-item correlation (*order craft beers at restaurants* and *enjoy beers that are unique*). The new reliability coefficient is .805 with inter-item correlations ranging from .342 and .686.

Satisfaction

Within the Aviator data, the *Satisfaction* category was found to have a coefficient of .584 (Table 4.5) with inter-item correlations ranging from .174 to .458. *Satisfaction with the tours* was removed because of low correlation to *Satisfaction with the taproom*. After removing the item,

reliability coefficient was .629 with an inter-item correlation of .458. While alphas at .7 or above indicate a good fit of items, an alpha of .5 or more is acceptable for factors with only two items (Tabachnick and Fidell, 2006). Mother Earth's data yielded a reliability coefficient for the three items was .691 with inter-item correlations ranging from .246 to .576. Although the correlation between *Satisfaction with the tours* to *satisfaction with the taproom* was a little low, it was not removed. The combined data showed the reliability coefficient for the three items in the combined data set was .686 with inter-item correlations ranging from .316 to .491.

The mean score for each factor ranged between one and five (table 4.5). *Involvement* was measured by one item: *On a scale of 1-5, 1 being 'not at all' and 5 being 'very much so', would you consider yourself a beer enthusiast?* *Brand Loyalty* was measured by one item: *Overall I consider myself loyal to the (Mother Earth/Aviator) brand.*

Table 4.6: Mean scores from combined data

Factor	Mean Score
Brand Loyalty	2.99
Involvement	3.7
Access	4.42
Environmental Consumption	3.9
Connection with the Community	4.15
Desire for Unique Consumer Products	3.98
Satisfaction	4.48

Determining which Factor Most Influences Brand Loyalty

The first research question: *Which factors most influence brand loyalty to craft breweries?* was examined using multiple regression. Correlation and multiple regression analyses were conducted to understand the relationship between brand loyalty and the six factors that influence it.

The four assumptions required for multiple regression are linearity, normality, homoscedasticity, and independence of residuals. Multicollinearity is not an issue because within the correlation matrix, no correlations exceed 0.8. The data, however, are not normally distributed and therefore violate the assumption of normality.

Table 4.6 summarizes the statistics and results from the analysis. All six factors are significantly and positively correlated with brand loyalty. The factors that most influence brand loyalty are the connection with the local community ($p = .001$), the desire for unique consumer products ($p = .002$), and satisfaction ($p = .008$). Beta values are standardized regression coefficients that explain how change in the predictor variables relate to change in the outcome variable. Beta values indicate change in standard deviation. The Beta value corresponds to the amount of change in the outcome variable (*Loyalty*) from every change of one standard deviation in the predictor variable. The *Connection with the Local Community* had the highest beta weight ($\beta = .268$) making it the strongest predictor of *Brand Loyalty*. Using this factor as an example, for every one unit of change in *Connection with the Local Community*, *Brand Loyalty* would be affected by one unit.

Table 4.7 Multiple Regression summary statistics

Variable	Mean	Std. error	Correlation with Loyalty	Multiple Regression Weights		sig
				b	β	
Involvement	3.72	1.137	0.305*	0.072	0.076	.285
Access	4.442	0.539	0.298*	-0.086	-0.043	.58
Environment	3.913	0.784	0.121*	-0.16	-0.116	.071
Community	4.159	0.517	0.423*	0.562	0.268	.001*
Unique	3.961	0.742	0.401*	0.351	0.24	.002*
Satisfaction	4.506	0.559	0.376*	0.369	0.19	.008*

Note: * = significant at the $p < .05$ level.

Examining Differences between Socio-demographic Groups

After determining which items within the six factors would be used, a mean factor score was calculated for each respondent. The mean score for each factor was used for the remainder of the analyses. Each of the socio-demographics variables (residency in the brewery town, gender, work sector, age, education, income, and birthplace) were run against the six factors to see significant differences among the demographics.

The data violated the assumption of normality for parametric tests and therefore non-parametric tests were used to compare the differences among socio-demographic groups. A Mann-Whitney U test was used for socio-demographic bivariate data (gender, residence, and birthplace). The assumptions that must be met for the Mann-Whitney U test are that the dependent variable is ordinal the assumption of normality has been violated, and the assumption of homogeneity of variance has been violated in a t-test, and the independent variable is continuous. Normality and homogeneity of variance were both violated in an independent samples t-test and the data are ordinal therefore the Mann-Whitney U test is appropriate for this data. A Kruskal-Wallis test was run for the variables with more than two groups (income, education, age, work sector). The assumptions of a Kruskal-Wallis are the same as for the Mann-Whitney. U test. All of these assumptions have been met.

Residence

Residence designation was determined by zip code. Respondents with a Kinston zip code who responded to the Mother Earth survey were regarded as Residents; others were regarded as Visitors. The same process was repeated with Fuquay-Varina zip codes within the Aviator data. The Resident responses and the Visitor responses from the two breweries were then combined.

Of the 261 total respondents, 19.5% were residents of the study area and 80.5% of respondents were visitors. A Mann-Whitney U test was conducted to compare the factor mean scores for residents and visitors to the study area. The two groups differed significantly in *Loyalty* ($p < .001$, $z = -3.959$), *Connection with the Community* ($p = .002$, $z = -3.168$), and *Satisfaction* ($p = .039$, $z = -2.069$) (Table 4.8). Residents were more loyal than visitors to the area, they were also significantly more interested in the *Connection with the Community* than visitors. Residents reported higher levels of satisfaction than visitors to the region.

Table 4.8: Brand loyalty to craft breweries and its influencing factors and residence

Factor	Residents	Visitors
Loyalty	150.90**	108.66**
Involvement	127.24	191.91
Access	136.56	125.91
Environment	125.09	132.44
Community	160.30*	123.23*
Unique	128.83	130.91
Satisfaction	148.99*	125.46*

Scale: 1=strongly disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; 5=strongly agree

** $p < .01$, * $p < .05$

Gender

The sample size for males (59.6%) and females (40.4%) was similar.. A Mann-Whitney U test was conducted to compare the mean ranks for males and females. There was a significant difference in mean rank for males and females within the *Involvement* ($p < .001$, $z = -4.459$), *Environmental Consumption* ($p = .009$, $z = -2.619$), and *Connection with the Local Community* ($p = .019$, $z = -2.345$) factors (Table 4.8). All three scores were significant at the $p = .05$ level. Men (mean rank = 147) are more *Involved* in the industry than females (mean rank = 106.14) where as women ranked higher in *Environment* (mean rank = 145.2) and *Connection with the community* (mean rank = 143.28) than men (mean ranks = 120.54 and 121.09 respectively).

Table 4.9: Brand loyalty to craft breweries and its influencing factors and gender

Factor	Male	Female
Brand Loyalty	117.96	114.27
Involvement	147**	106.14**
Access	125.8	130.03
Environment	120.54**	145.20**
Community	121.09*	143.28*
Unique	137.32	119.26
Satisfaction	128.08	131.61

Scale: 1=strongly disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; 5=strongly agree

** $p < .01$, * $p < .05$

Birthplace

Birthplace data were obtained by asking the city and state where respondents were born.

A similar process as residence was used to determining if they were born in Kinston for the Mother Earth survey and Fuquay-Varina for the Aviator respondents. Of the 258 total respondents, 8.5% were born in the study area and 91.5% of respondents were born outside the area. A Mann-Whitney U test was conducted to compare the factor mean scores for born with and outside of the study area. There was a significant difference in mean scores for respondents born within and outside of the study area within *Connection with the Community* ($p = .003$, $z = -2.971$) (Table 4.10). Respondents born within the study region (mean rank = 173.86) tend to be more interested in the *Connection with the community* than those born outside the study region (mean rank = 124.8)

Table 4. 10: Brand loyalty to craft breweries and its influencing factors and birthplace

Factor	Within the Study Region	Outside of the Study Region
Loyalty	139.25	128.59
Involvement	130.11	114.18
Access	128.32	126.34
Environment	155.43	127.08
Community	173.86**	124.8**
Unique	142.73	127.71
Satisfaction	138.23	127.59

Scale: 1=strongly disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; 5=strongly agree

** $p < .01$, * $p < .05$

Work Sector

A Kruskal Wallis was conducted to compare mean scores between work sectors within each of the six factors. The significant findings were within *Loyalty* ($p = .036$), *Connection with the Community* ($p = .021$), *Environmental Consumption* ($p = .005$) and *Satisfaction* ($p = .013$). Of the 260 respondents to this question, the majority of respondents work in the private sector (48.5%). Only nine respondents (3.5%) were retired and just seven respondents (2.7%) were unemployed, therefore they were removed from the analysis to make the group sizes similar. The Kruskal Wallis test showed significant differences in *Loyalty* where the public sector (mean rank = 91.26) is less *Loyal* than the private sector (mean rank = 121.34). Students answered significantly higher in *Environmental Consumption* than any other sector (mean rank = 165.67). (Table 4.11).

Age

A Kruskal Wallis test was conducted to compare mean ranks between age ranges within each of the six factors. Of the 260 total respondents only two (0.8%) were over the age of 70; therefore these two groups were combined to create *60 years or older*. The results within the factor *Unique* were found to be statistically significant ($p = .015$). The 21-30 year old

respondents (mean rank = 144.28) value uniqueness significantly more than 41-50 year olds (mean rank = 111.13) and respondents 60 years old or older (mean rank = 87.19) (Table 4.11). Also respondents age 31-40 years old (mean rank = 133.68) value uniqueness more than those 60 years and older (mean rank = 87.19)

Education

A Kruskal Wallis test was conducted to compare mean scores between levels of education. Of the 260 total respondents only seven (2.7%) were unemployed; and just nine respondents reported they were retired (3.5%); therefore those groups were removed. There were statistically significant differences among levels of education within the *Access* factor ($p = .045$) (Table 4.11). Respondents with advanced degrees (mean rank = 149.41) are more concerned with accessibility than respondents with a college degree (mean rank = 121.28).

Income

A Kruskal Wallis test was also conducted to compare mean scores between income within each of the six factors. The significant findings were within *Involvement* ($p = .035$) and *Environmental Consumption* ($p = .045$). Of the 260 total respondents to this question, the majority of respondents earn between \$60,000 and \$89,000 (26.2%). Overall, respondents making less than \$30,000 per year (mean rank = 158.23) are more involved in the brewing industry than other respondents however they are significantly more involved than respondents who make between \$90,000 and \$120,000 (mean rank = 100.11). Similarly, respondents who make between \$60,000 and \$89,000 (mean score = 135) and respondents making over \$120,000 (mean rank = 142.33) are more involved than those making between \$90,000 and \$120,000.

Respondents who make less than \$30,000 annually (mean rank = 158.23) are significantly more concerned with the environment than respondents with any other level of income (Table 4.11).

Table: 4.11: Brand loyalty to craft breweries and its influencing factors and socio-demographic variables

	Loyalty	Involve	Access	EnvCon	Comm	Unique	Satisf
Work Sector							
Public Sector	91.26	107.57	106.27	112.79**	94.35*	110.45	95.83*
Private Sector	121.34	121.64	124.67	119.08**	129.56*	123.52	129.23*
Non-Profit Sector	127.83	104.45	122.64	107.71**	129.85*	112.54	138.11*
Own Business	102.85	139.4	112	110.58**	111.4	123.33	104.63
Student	99.36	137.23	124.14	165.67**	140.61*	138.16	136.53*
<i>H</i>	9.736	5.372	3.184	14.692	12.449	3.453	12.839
Sig.	.045	.251	.528	.005	.014	.485	.012
Age							
21 - 30 years old	108.83	137.53	136.59	143.18	142.63	144.28*	129.66
31 - 40 years old	124.42	140.85	123.5	122.12	123.68	133.68*	140.15
41 - 50 years old	105.29	116.92	119.94	119.15	117.06	111.13*	118.60
51 - 60 years old	145.09	116.52	123.93	116.07	131.29	114.84	129.14
60 years or older	111.59	93.31	105.5	136.19	96.58	87.19*	110.12
<i>H</i>	8.767	8.365	3.701	6.14	7.446	12.319	3.357
Sig.	.079	.067	.448	.189	.114	.015	.5
Education							
Community College/ Technical School/ High School	122.83	130.49	123.53	114.74	122.04	133.16	130.86
4-Year College or University	111.13	129.53	121.28*	130.08	127.93	128.69	123.42
Advanced Degree	123.57	130.84	149.41*	144.77	141.21	128.25	143.19
<i>H</i>	1.967	.016	6.206	4.378	1.941	.160	3.037
Sig.	.374	.992	.045	.112	.379	.923	.219
Income							
Less than 30,000	109.45	143.47*	124.65	158.23*	148.24	144.72	137.59
30,000 - 59,000	101.28	122.5	129.99	128.98*	132.48	132.57	111.47
60,000 - 89,000	124.61	135*	128.62	127.56*	128.58	133.4	132.7
90,000 - 120,000	110.52	100.11*	120.5	124.96*	111.97	110.78	137.11
More than 120,000	142.33	131.89*	131.35	113.73*	125.27	122.73	130.31
<i>H</i>	7.195	10.374	.662	9.751	5.316	5.076	4.44
Sig.	.035	.126	.956	.045	.256	.28	.35

Note: Loyalty = Brand Loyalty; Involve = Involvement; EnvCon = Environmental Consumption; Comm = Community; Satisf = Satisfaction

** $p < .01$, * $p < .05$

Examining Differences in Response Across Breweries

To answer the third research question, a Mann-Whitney U test was run to compare each of the factors between the two breweries. The mean scores for each of the factors was used and ran against an independent variable distinguishing between Mother Earth and Aviator respondents. All of the tests were run with the independent variable of *Brewery* (Mother Earth = 1, Aviator = 2). In each of the Mann-Whitney U tests the variance assumption has been violated at least once therefore equal variance not assumed was used in those cases.

Patrons to Mother Earth Brewing were more *Loyal* than their counterparts at Aviator Brewing Company. There was a statistically significant difference ($p = .016$) in loyalty between the two breweries. Customers at Mother Earth Brewing (mean rank = 134.14) were more loyal than customers at Aviator Brewing (mean rank = 102.66) (Table 4.11). Likewise, Mother Earth Brewing patrons (mean rank = 142.81) scored significantly higher in terms of level of involvement than those to Aviator Brewing (mean rank = 102.66, $p < .01$) (Table 4.12).

There is no significant difference between the two breweries in terms of access to the brewery. However, it is important to note that both breweries had a mean score of nearly 4.5 out of 5 meaning the respondents believe that access to the product increases the bond with the brand and teaches visitors about the brewery and the product (Table 4.12).

Patrons to Mother Earth Brewing (mean rank = 148.11) were significantly more concerned with environmental issues than those to Aviator brewing (mean rank = 116.96, $p < .001$) (Table 4.12).

The Mann-Whitney U test showed a significant difference ($p < .01$) within *Connection with the Local Community* at the two breweries. Patrons of Mother Earth Brewing (mean rank = 155.92) show more concern with the *Connection with the Community* than customers from

Aviator Brewing (mean rank = 110.25). Also, patrons of Mother Earth Brewing (mean rank = 155.92) scored significantly higher in terms of level of *Involvement* than Aviator Brewing (mean rank = 110.25, $p < .016$) (Table 4.12).

There is a significant difference ($p < .01$) in Uniqueness between the two breweries. Customers of Mother Earth Brewing (mean rank = 146.06) are more concerned with *Uniqueness* than customers of Aviator Brewing (mean rank = 117.78) Visitors to Mother Earth Brewing (mean rank = 146.04) were significantly more concerned with environmental issues than visitors to Aviator brewing (mean rank = 117.78) (Table 4.12). There is also a significant difference ($p < .01$) within *Satisfaction* at the two breweries. Visitors to Mother Earth Brewing (mean rank = 154.08) scored significantly higher in terms of *Satisfaction* than visitors to Aviator Brewing (mean rank = 110.94) (Table 4.12).

Table 4.12: Mean ranks comparing breweries

Factor	Aviator Means	Mother Earth Means
Loyalty	102.66*	134.14*
Involvement	121.03**	142.81**
Access	125.13	131.91
Environmental Consumption	116.96**	148.11**
Connection with the Community	110.25**	155.92**
Desire for Unique Consumer Products	117.78*	146.04*
Satisfaction	110.94**	154.08**

Scale: 1=strongly disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; 5=strongly agree

** $p < .01$, * $p < .05$

Summary

The data resulted in many significant findings within factors influencing loyalty, how different patrons perceive the breweries, and how the two breweries differ in what their clientele prefer. The Cronbach's Alpha test allowed for items that did not cluster as well to be removed for the reliability of this study. However, the same items were not removed from each of the data

sets. It is important to remember that this study is exploratory and items and factors can be changed and tested to make the results more reliable.

Table 4.6 showed the mean scores from each of the factors. Almost all of those scores were over 3 meaning regardless of significant findings when testing which factor most influences *Loyalty*; respondents are fairly receptive to the factors. *Environmental Consumption* and *Connection with the Community*, for instance, were not significant in which factors influence brand loyalty but both had a mean score of nearly 4.5 making them very important factors to consumers. It is important to look at the mean scores within each factor to see how important various issues are to the visitors to the brewery and not just the statistically significant findings of each test.

CHAPTER 5: DISCUSSION

Introduction

This study investigated the factors that influence brand loyalty to craft breweries in North Carolina. There is not much academic research on brand loyalty in the craft brewing industry, and almost no research about visitors to craft breweries. Throughout this chapter ‘visitors’ refer to visitors to the brewery regardless of their status as tourists to the area. Some of the patrons to the brewery were residents of Kinston or Fuquay-Varina; some came from other areas of the county, while others came from further still.

Craft breweries are one of the many ways in which communities have been connecting to their local identity (Schnell & Reese, 2003) and potentially attracting tourists. The main research objective of this study was to explore visitor motivations to breweries within the context of brand loyalty. This study also examined various demographics of visitors and how motivations varied among those demographic characteristics. The survey was distributed at two North Carolina breweries, Mother Earth Brewing Company and Aviator Brewing Company, over a six-week period in April and May of 2012. The specific research questions explored in this study were:

- Which factors most influence brand loyalty to craft breweries?
- How do brand loyalty and the influencing factors differ among various brewery visitors?
- Do visitors to different breweries vary in their brand loyalty and influential factors?

Summary of Tests

A reliability analysis determined how well each survey item was grouped into its respective factor. Each of the mean scores were ranked from one to five, one being *Strongly Disagree* and five being *Strongly Agree*. This test allowed for items with very high and very low inter-item correlation to be removed. The remaining items were averaged to create six factor

mean scores, which were used for the rest of the analysis. The data from the two breweries was then combined. Significant differences emerged among various demographic groups, including residence, gender, work sector, age, and income.

One theory employed in this study is recreation involvement. According to Kyle and Chick (2002, p. 427), “Involvement reflects the degree to which a person devotes him or herself to an activity or associated product.” Recreation involvement was measured using one question that was simply, “*On a scale of 1-5, 1 being ‘not at all’ and 5 being ‘very much so’, would you consider yourself a beer enthusiast?*” This question allowed respondents who were visiting the brewery because a friend or relative wanted to go to be separated from visitors who are interested in the brewing process and tasting new beers. Overall the mean response to this question was 3.7 out of 5, and more males considered themselves enthusiasts than females. The respondents who were the most self-proclaimed enthusiasts were between 21 and 40 years old and make less than \$30,000 annually which justifies Li and Petrick’s (2003) claim that “the technical, financial or psychological factors which make it difficult or expensive for a customer to change brand” (p. 26). Consumers who make less money are more likely to spend money on familiar products because they know and trust that particular brand. In the case of loyalty to microbreweries, a low income could be one of the influential factors to why consumers repeat patronage to certain microbreweries.

Access referred to the ability to tour the brewery and buy products at the brewery. Mitchell and Orwig (2002) discussed how consumer experience tourism “can strengthen the bond between consumers and brands by providing a visual presentation of the brand, its operation, production process, history, and historical significance” (p. 32). Similarly, Brown (1989) discussed how convenience plays a large role in accessibility and loyalty. When

responding to questions regarding access to the company, respondents reported a mean score of 4.42, the second highest mean score of the six factors (behind satisfaction). This is related to Oh, Fiore, and Jeoung's (2007, p. 119) work which states that "in *experience economy*, consumers seek unique experiences beyond merely consuming products and services because the consistent, high level of product and service quality can no longer be used to differentiate choices for consumers." The experience economy allows consumers to learn about the product and have a unique experience with that product. While *Access* was not a significant finding in the multiple regression analysis as it relates to brand loyalty, it does seem to leave visitors with a better understanding of the product, the brewing process, and a closer bond with the brand. As the only bar in downtown Kinston, the convenience of access for consumers could be a major factor in influencing brand loyalty. Similarly, Aviator has a taproom in downtown Fuquay-Varina and is one of the only bars in the downtown area making it convenient for people living in Fuquay-Varina.

Another element explored was the impact of *Environmental Consumption* on visitors to the breweries. Mother Earth Brewing Company is currently working to become the first Leadership in Energy and Environmental Design (LEED) certified brewery in America, therefore, it was expected that some visitors to the brewery may be concerned with the environmental impacts of that brewery specifically. However, *Environmental Consumption* was not found to be a significant factor in influencing brand loyalty in this study. According to Poitras and Getz (2006, p. 426), "sustainable development and marketing principles are now being applied to tourism in many settings, although there is a need to make them relevant to specific forms of tourism and related niche markets such as wine tourism". This can also be applied to beer tourism however, according to the results; consumers who care most about the

environment make the least amount of money, are younger, and hold a bachelor's degree. Respondents did however report a mean score of 3.9 of 5 when it came to environmental consumption. In general, women ranked higher in *Environment* (mean rank = 145.2) than men (mean rank = 120.54) and students (mean rank = 165.67) were more interested in the environmental aspects than any other work sector.

Craft breweries allow for consumers to drink a beer unique to the area. Craft brews are also often scarce in regions in the country where the beer is not produced. Flack (1997, p. 46) states, "as with almost everything in this society of conspicuous consumption, the beer that a person drinks has become a sociological marker or symbol of self-definition." The *Desire for unique consumer products* is a concept that explores how consumers feel they define themselves by the products they purchase or consume (Ruvio Shoham, & Brencic 2008). Craft breweries allow consumers to drink a beer unique to the area. Items related to uniqueness asked respondents whether they try local beers on vacation, order local beers in restaurants, and if they enjoy being one of the first to try a newly released or seasonal beer. The mean *Uniqueness* score was 3.98 and emerged as one of the statistically significant factors that influences brand loyalty to craft breweries. Also, it was found that younger respondents value uniqueness more than older respondents. Mitchell and Orwig (2002) discuss how breweries and brew-pubs are marketing the uniqueness of their product and company. "Further, the recent explosion in the number of smaller breweries and brew pubs seeks to capitalize on the consumer's interest in the manufacturing process and the 'chic-ness' of the consuming on-the-spot made beverages" (Mitchell & Orwig, 2002, p. 32). Respondents to the survey from Mother Earth Brewing reported being significantly more interested in *Uniqueness* than respondents to Aviator Brewing. One explanation for that is the idea of consumers revisiting the idea of localism and buying local.

James R. Shortridge's (1996) definition of 'neo-localism' as: "deliberate seeking out of regional lore and local attachment by residents (new and old) as a delayed reaction to the destruction in modern America of traditional bonds to community and family" (p. 38) is apparent in this study as younger respondents, students, and respondents making less money all scored higher than their counterparts in *Uniqueness and Connection with the Community*.

Satisfaction, quite possibly the most obvious factor, was measured by asking respondents if they were satisfied with the taproom, tour, and beer while visiting the brewery. *Satisfaction* was the second most significant predictor of *Brand Loyalty* (behind *Connection with the Community*) and had a mean score of 4.48, meaning respondents were very satisfied with all three products. The Investment Model described by Li and Petrick (2003) discusses how people are generally seeking to maximize rewards (including satisfaction) and minimize costs. This model is expressed in this study as respondents with lower income are more loyal and satisfaction is a predictor of brand loyalty.

One purpose of this study was to investigate which of the aforementioned factors most influenced brand loyalty. *Brand Loyalty* was measured using one item "Overall I consider myself loyal to the Mother Earth/ Aviator brand." Prior research has shown that brand loyalty is strongly aligned with repeat patronage. While repeat patronage information was collected on the survey, the data was not used in this study as a measurement for the loyalty factor. However, future studies might consider combining repeat patronage with the brand loyalty item to create a more reliable factor.

When measuring for the primary research question, the multiple regression analyses showed that *Connection with the Community* (Schnell & Reese, 2003), *Satisfaction* (Li & Petrick, 2003), and *Desire for Unique Consumer Products* (Ruvio Shoham, & Brencic 2008)

most influenced brand loyalty. According to Vermeir and Verbke (2005) price, quality, convenience, and brand familiarity are the most important criteria when forming a decision in terms of consumption. This study showed that, in the case of craft breweries, making a *Connection with the Community* is more important. This study also explored how customers to the two breweries differ in what their consumers look for their motivations to visit the breweries are. The two breweries differed significantly in *Loyalty* and all of the six influencing factors with the exception of *Access*. Mother Earth has implemented several environmental practices in their building design and operation; because of these practices it was expected that *Environmental Consumption* would be a significant factor that distinguished the two breweries. Mother Earth customers not only rated Environmental Consumption higher than Aviator but also *Satisfaction*, *Connection with the Community*, *Involvement*, and *Loyalty*. One possible explanation for why patrons to Mother Earth value the *Connection with the Community* more than Aviator patrons is because the labels and beer names are not connected with the town's history but rather with the owner's history and hobbies (airplanes). Mother Earth, on the other hand, uses local landscapes in their labeling and in several beer names. When asked to provide the words that come to mind when you think of the taproom, one respondent reported of Mother Earth "this is Kinston? [The taproom is] trend-setting." Residents to Kinston and those familiar with the area are generally happy to see Mother Earth Brewing Company making a positive change in a once, more vibrant community.

The connection with the local community is arguably the most important factor that influences brand loyalty to craft breweries. Schnell and Reese (2003, p.46) suggest that one reason for the rapid increase in the craft brewery movement is "in part from the desire of people to break away from the smothering homogeneity of popular, national culture, and reestablish

connections with local communities, settings, and economies.” Survey items exploring *Connection with the Community* asked questions regarding the tourism that the brewery brings, economic impact of the brewery in the towns, the celebration of the local culture at the brewery, and the social benefits of the brewery. *Connection with the Community* was statistically higher among residents in the study region, gender, and work sector groups. Residents in the study region (residents of Fuquay-Varina who responded to the Aviator survey and residents of Kinston who responded to the Mother Earth survey), females, and respondents employed in the public sector all have a higher value for the brewery’s *Connection with the Community*. The multiple regression performed indicated that the *Connection with the Community* was the relationship with the strongest weight. Connection with the community was also apparent within the open-ended question.

Implications

With craft breweries rapidly developing as a niche industry in the United States, it is important to recognize why consumers decide to visit a brewery, as well as choose to visit one brewery over another. For some smaller towns, breweries are a main attraction for visitors and residents alike. Some cities, such as Bend, Oregon, are creating beer trails to facilitate a packaged experience for travelers (<http://www.visitbend.com>). This current research is beneficial for tourism researchers, tourism planners, and brewery owners or managers when developing product development and marketing strategies. For tourism planners and destination marketing organizations, it is important to see how many people are traveling to an area specifically to visit the brewery. If the brewery is the main attraction in the town, it needs to be at the forefront of the community’s marketing strategy.

Open-Ended Responses

The comparison between the two breweries yielded interesting results with Mother Earth Brewery scoring significantly higher in six of the seven factors examined (including loyalty). One interesting difference between the two breweries apparent in the responses to open-ended questions about the taproom and tour is that many Mother Earth respondents discussed the atmosphere and the ambiance of the brewery whereas respondents to the Aviator survey discussed the beer and the people giving the tour. For example, one respondent to the Mother Earth survey said “the taproom was the main reason I wanted to come to the brewery. I heard it was nice and that it had a great atmosphere, so I came on over.” One comment regarding the taproom at Aviator was: “Smaller than many other breweries, but not crowded. Excellent selection. Courteous staff knows the product.” The vast differences in responses between the two breweries needed to be explored. Upon further examination, two major implications were discovered; first, that this study is more about attraction or destination loyalty rather than brand loyalty, and second, that the economic status of the two study regions is too different to compare the breweries on similar scales.

Attraction Loyalty

Visitor motivations to breweries differ in many ways. For some, the visit to the brewery is their primary purpose for the trip, while for others, it is secondary to visiting friends and family. It is therefore difficult to separate visitors who are loyal to the beer (brand loyalty) from visitors who are loyal to the place (attraction or destination loyalty).

Attraction loyalty is defined by Yoon and Uysal (2003) as “the degree of tourists’ loyalty to a destination ...reflected in their intentions to revisit the destination and in their

recommendations to others” (p. 45). It could be argued that repeat purchasing of beer is brand loyalty whereas repeat visitation to a brewery is attraction or destination loyalty. One of the major theories used in this research is consumer experience tourism (CET). While CET allows visitors to the brewery to develop a closer connection with the brand, they are also developing a deeper connection with the brewery as a place. The difference between brand and attraction loyalty presents itself when, after a visit, the consumer recommends the beer (brand loyalty) or the experience (attraction loyalty) of visiting the brewery to a friend. It also presents itself in whether the consumer buys the beer after their visit (brand loyalty) or if they return to the brewery after their initial visit (attraction loyalty). The tours and the taproom create an experience that is unique to that brewery and allows for the creation of place attachment. Once customers have bonded to the brewery as a place, the brewery has created a brand for itself rather than just a brand loyalty for the beer.

Study Regions

Kinston and Fuquay-Varina are similar in that they have similar population sizes and neither town is considered a major tourism destination within North Carolina. However the two towns are very different. While Kinston was once a vibrant city in eastern, North Carolina, it is now struggling economically. From 2000 to 2010 the population has dropped 8.5% from 23,688 to 21,677 and the current percent of residents living below the poverty level is 34.1% (North Carolina Quick Facts from the U.S. Census Bureau, 2012). However, Fuquay-Varina is a growing town on the outskirts of Raleigh (the capital city of North Carolina). The population has increased 127.1% in the past ten years from 7,898 to 17,937 and the percentage of persons living below the poverty level is just 8.3% (North Carolina Quick Facts from the U.S. Census Bureau,

2012). The higher general support of Mother Earth Brewing over Aviator Brewing could be related in part to the fact that Kinston is trying to rebuild its historic community and downtown area. The residents and visitors from eastern North Carolina want the business to be successful and are looking to Mother Earth Brewing to be a “growth pole” for the community. Fuquay-Varina is a growing town in many ways and therefore does not need one business to create major economic change for the community.

The differences between the two communities were not reflected in the demographics. The sample was not representative of the community in terms of race. Almost all of the respondents (97.3%) were white, however 19.7% of the population of Fuquay-Varina and 68% of the population of Kinston is Black. The lack of non-white representation at either of the breweries could perhaps be reflective of the breweries having primarily white customers and therefore not seeming like a welcoming environment to people of different races and ethnicities. Future studies might explore the implications of race and ethnicity in brand and attraction loyalty for craft breweries.

Craft breweries are generally locally owned small businesses with limited budgets. Understanding what consumers value in a brand will allow breweries to utilize their marketing budgets in a way that is supported by research. This study also emphasizes the tours at breweries and what visitors tend to value in their breweries. Brewery tour guides can use this information to better prepare for tours and relay the information desired by consumers.

Limitations

This study was implemented based on several studies in different fields and therefore was open to various limitations. First of all, this study was focused on two small-scale breweries in

North Carolina and therefore cannot be generalized to larger breweries in North Carolina or other breweries across the United States. The two areas are also very different in size, population, and economic wealth. Lenoir County is very centralized around Kinston (the county seat) therefore it would be important to consider all Lenoir County residents as ‘residents’ rather than just those who live in Kinston proper. Fuquay-Varina is not a major city within Wake County and therefore does not bring in many people from other Wake County cities. The two areas were similar in that they both have less tourist flow than some other cities with microbreweries in them. However, the two study regions were very different and therefore two more comparable cities could have been selected for this study. Similarly, distance decay theory was not implemented in this study due to a small sample size. The small sample size would not have allowed for patterns to emerge in terms of where people are coming from in order to visit the brewery.

The survey was only distributed online, therefore visitors to the brewery with limited Internet access were not able to take the survey. The sample of current residents and those born in the study area was much smaller than the sample of tourists and those not born in the study area (residency and birthplace were only measured within the city; those born within Lenoir and Wake County but not in Kinston or Fuquay-Varina were considered tourists). Also, while email addresses were conducted over the same period of time for the same number of days, they were not collected on the same days at both breweries, and only during one season of brewery operation.

Each of the six factors was comprised of number of items, except *Involvement*. It may have yielded more reliable results if the number of items included had been more than one. This study was also open to several external factors which influenced people to visit the breweries,

such as a Living Social © or Groupon © deal (online coupons offering products at a discounted price). External factors and number of email addresses collected are listed by date in table 5.1.

Table 5.1: Data collection dates and external factors

Date	Mother Earth Brewing Emails Addresses Collected	Aviator Brewing Emails Addresses Collected	Potential External Factors
Thursday, March 29	0	26	Groupon and Living Social Deals in effect for Aviator Brewery tour
Friday, March 30	0	37	Groupon and Living Social Deals in effect for Aviator Brewery tour
Saturday, March 31	43	32	Kinston Run for the River - Downtown Kinston, NC (300+ Participants). The “after party” was hosted at Mother Earth Brewing
Thursday, April 5	0	26	N/A
Friday, April 6	25	0	N/A
Saturday, April 7	0	44	Living Social Deal for Aviator Brewery Expires
Wednesday, April 11	29	0	Release party for the 2012 Tripel Overhead (a Belgian tripel released once a year) at Mother Earth Brewing
Friday, April 13	25	0	Live band from Greenville performs at Mother Earth Brewing
Saturday, April 14	0	33	World Beer Festival, Raleigh, NC
Thursday, April 19	0	18	N/A
Friday, April 20	0	8	Carolina Championship of Beer
Saturday, April 21	7	0	Hickory Hops Festival - Hickory, NC
Thursday, April 26	20	0	Beer dinner featuring Mother Earth Beer at Revolution Cuban Restaurant in Durham, NC
Friday, April 27	30	0	N/A
Saturday	12	0	N/A

Suggestions for Future Research

This exploratory study intended to reveal which factors influence brand loyalty to craft breweries and why certain visitors choose one brewery over another. The development of this study was based off of previous research and will lead to future research in the field of beer tourism. There are several opportunities for future research to better understand the driving factors in beer tourism which are listed below.

- Develop a shorter survey with concise points based on similar research to yield a higher response rate
- Examine two breweries with similar geographic regions, economic statuses, and socio-demographics
- Investigate factors besides the six mentioned here to establish if others play a larger role in determining brand loyalty to craft breweries.
- The items in this study were developed using wine tourism studies looking at loyalty, experiences, and environmental attitudes. Future research on beer tourism could look into other similar issues examined in wine tourism, such as packaging (Barber, Taylor, and Deale, 2010), environmental concerns (Barber, Taylor, and Deale, 2010), and tourism (Brown and Getz, 2005).
- Explore motivations behind tourism via beer trails in towns like Bend, Oregon and Asheville, North Carolina could be looked in to
- Examine the differences between customers who took the tour and who did not take the tour.
- Explore exactly how far someone is willing to travel for beer or to visit a microbrewery

- Replicate the study in larger-scale breweries or compared among craft beer sectors (brewpub, craft brewery, and regional brewery).
- Look into the opinions of the residents by surveying stakeholders in the community and comparing their responses to visitor responses.
- Compare breweries across the country at various scales in various geographical regions, including international breweries.

Summary and Conclusions

The purpose of this study was to explore what factors most influenced brand loyalty to microbreweries and how customers to two breweries value different aspects of the microbrewery experience. Through marketing, recreation, tourism, and sociology research, a model was created to measure the driving factors behind brand loyalty to craft breweries. This research should be expanded in various tourism contexts and geographic regions.

This study looks at craft microbreweries as tourism attractors in small towns and how these small businesses can work as examples of potential sustainable tourism businesses. Craft microbreweries can meet the triple bottom line of environmental, economic, and socio-cultural sustainability and have the potential to attract customers who would not necessarily know or understand that they are participating in sustainable tourism. They may meet the socio-cultural sustainability through their expressions of the local community, history, and landscapes in the naming of beers, labels, and history during the tours. Environmental sustainability can be expressed through the recycling of used grain to local farmers, use of renewable energy, and initiatives involving the promotion of canning beers. Finally, what is most expressed in Kinston is that small scale breweries are typically locally owned and therefore provide a positive economic impact on the town. They bring in tourism and employ locally keeping the money

earned in the local community. This study is for destination marketing organizations (DMO) to better understand who visits breweries and why and for breweries, DMOs, and researchers to understand breweries as sustainable tourism destinations. Similarly, this study relates to sustainable tourism by examining two attractions in North Carolina and the motivations behind visitation to these attractions. It explores visitor preferences in patronizing a microbrewery and discusses how visitors view the breweries in terms of the six loyalty factors incorporated in this study. This study explores sustainable tourism by attempting to understand the motivations behind visitation to craft breweries. It relates to sustainable tourism by examining how Consumer Experience Tourism can bring consumer at breweries closer to the brand. Finally, it explored how respondents living in the town value the attraction as compared to those visiting the area.

This study is an introduction into understanding why consumers choose to visit one brewery over another. Much more research needs to be done to fully understand the motivating factors behind brand loyalty to such establishments. Increased incorporation of the ‘neo-local’ concept and environmental consumption could be incorporated as both trends continue to grow into the future. Finally, breweries should use this information to tailor their tours and marketing efforts to reach out to their niche market and provide them with an experience unique to the brewery and pleasing to the consumer.

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APPENDIX A: Factors Influencing Brand Loyalty: Mother Earth Survey

1. Informed Consent Page

Thank you for agreeing to complete this survey. The survey is being conducted by East Carolina University's Center for Sustainable Tourism to gather information about resident and visitor perceptions of North Carolina's Breweries. Breweries not only contributes to the economic base of communities but helps to preserve our culture and our environment. Mother Earth Brewing Company wants to make sure your visit was a positive experience.

We ask that you respond to the questions in this study by being as honest as possible. AS A THANK YOU FOR PARTICIPATING IN THIS SURVEY, YOU WILL BE ENTERED INTO A DRAWING FOR A \$50 GIFT CARD TO MOTHER EARTH BREWING CO. At the end of the survey, we ask for your contact information so that we can enter you in the drawing. This information will be stored separately from your survey responses so that they remain anonymous.

The questionnaire should take approximately 10-15 minutes of your time. Your participation in this study is voluntary and you may withdraw from the study at any time without penalty or loss of benefit. Your consent will be indicated by filling out the survey. There are no foreseeable risks to participating in the study. The results of this study may be published but no names will be used and individual responses will be maintained in confidence by the researchers. Anonymity and confidentiality will be assured.

Your participation will allow us to develop a greater understanding of who visits Mother Earth and why they chose Mother Earth rather than another brewery. The information obtained from the survey will be used to guide beer tourism development in North Carolina.

If you have any questions concerning the research study, please contact Alison Murray at murray11@students.ecu.edu. Thank you in advance for taking the time to share your insights with us, and thank you for visiting Mother Earth Brewing Company!

Sincerely,
Alison Murray, M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University
Greenville, North Carolina

2. About you

***1. What is your zip code/ postal code?**

2. What is your gender?

- ☐ Male
☐ Female

3. What is your primary form of work?

- ☐ Public Sector
☐ Private Sector
☐ Non-profit sector
☐ I have my own business
☐ I am retired
☐ I am a student

Other (please specify)

4. What is the year of your birth?

5. In what city and state were you born?

6. Of what race/ethnicity do you consider yourself?

- ☐ White
☐ Black or African American
☐ Asian
☐ Native Hawaiian or Other Pacific Islander
☐ Hispanic

Other (please specify)

3. About your involvement in the brewery industry

9. How long have you been regularly consuming beer? (years)

10. How long have you been regularly consuming craft brews? (years)

11. Have you ever worked in the brewing industry or as a bartender?

☐ Yes

☐ No

If yes, for how long? (years)

12. Have you ever experimented with home brewing?

☐ Yes

☐ No

If yes, for how long (years)

13. On a scale of 1-5, 1 being 'not at all' and 5 being 'very much so', would you consider yourself a beer enthusiast?

☐ 1 (Not at all)

☐ 2

☐ 3

☐ 4

☐ 5 (Very much so)

4. About your Visit

14. When another brand is on sale, I will generally purchase it rather than my preferred brand of beer

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
When shopping at a grocery store, I will generally purchase Mother Earth Beer regardless of whether another brand is on sale	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall I consider myself loyal to the Mother Earth Brand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. Including this past visit, how many times have you visited Mother Earth Brewing Co. in the last year?

- ☐ 1 visit
- ☐ 2-3 visits
- ☐ 4-5 visits
- ☐ 6-7 visits
- ☐ More than 8 visits

16. During your most recent visit to Mother Earth Brewing Co., did you take the tour?

- ☐ Yes
- ☐ No

17. During your most recent visit to Mother Earth Brewery, did you go to the taproom?

- ☐ Yes
- ☐ No

18. During your visit did you purchase a growler or souvenirs (shirts, koozies, etc) at the brewery? If so, please tell us what you purchased.

- ☐ Yes
- ☐ No

Purchased goods

19. After your visit did you buy Mother Earth Products (beer at a restaurant or in a store or t-shirts online)?

- ☐ Yes
- ☐ No

20. If you're not a resident of the area, what was your primary reason for visiting Kinston?

21. Will your recent visit with Mother Earth Brewing Co. influence visiting other breweries in the future?

☐ Yes

☐ No

If yes, please explain what influence it will have. If no, why not?

22. Will your visit to Mother Earth Brewing Co. inspire/encourage you to drink more craft beers?

☐ Yes

☐ No

If yes, please explain what influence it will have. If no, why not?

5. About brewery tours in general

23. Please indicate which response best illustrates your level of agreement.

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
The tours at Mother Earth Brewing Co. help to establish a customer bond with the brand.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The tours at Mother Earth Brewing Co. help to explain the brewery's environmental/green operations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumers increase their knowledge of the brewing process through brewery tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumers who visit breweries have a better understanding about the product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brewery tours provide an added recreational activity for the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mother Earth Brewing Co. tours educate visitors about aspects of Kinston's history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brewery tours are a low-cost entertainment option for community groups, business travelers, groups of friends, and others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. About your environmental preferences and the brewery's connection with Kins...

24. The following questions are about your environmental preferences when choosing to buy beer. Please select the best answer choice for each question.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
Breweries should take measures to lessen their impact on the natural environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the price were the same, I would switch from my usual beer brand to an environmentally friendly beer option	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the price were 10% more expensive, I would switch from my usual beer brand to an environmentally friendly beer option	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Green practices enhance the image and brand of the brewery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. These questions are about brewery tours and their relationship with the host community. Please select the best answer choice for each question.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
Mother Earth Brewing Co. celebrates the local culture and traditions of Kinston through its products and events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I personally receive social benefits from Mother Earth Brewing Co. (improved quality of life, meeting interesting people, and adding vibrancy to Kinston)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mother Earth Brewing Co. provides economic benefits to Kinston (income, employment, taxes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitors to Mother Earth Brewing Co. also spend money at other Kinston businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The additional tourists that Mother Earth Brewing Co. attracts positively impacts the town	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mother Earth Brewing Co. has had a positive impact on the tourism industry in Kinston	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. About uniqueness in the brewing industry

26. Please select the best answer choice for each question.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
I tend to be a fashion leader rather than a fashion follower in what I eat and drink.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When I travel, I like to buy the local craft beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would prefer to have craft beer rather than a beer from a large-scale brewery.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When ordering beer at a restaurant or bar, I rarely pass up the opportunity to drink a craft beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like to be one of the first to try a newly released or seasonal beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I enjoy buying beers that are unique	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

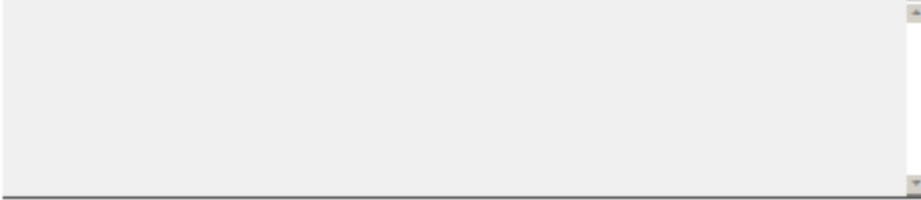
8. About your satisfaction with Mother Earth Brewing Co.

27. Please select the best answer choice for each question.

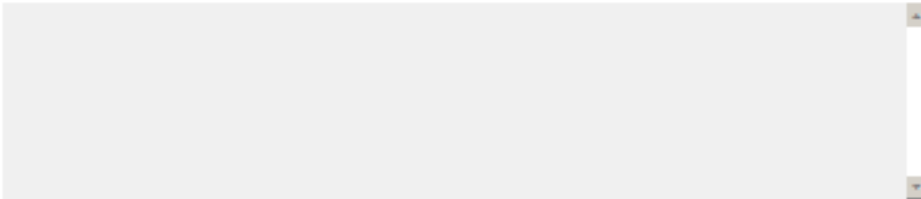
	Very Satisfied	Satisfied	Neither Satisfied nor dissatisfied	Dissatisfied	Strongly dissatisfied	Not Sure/ Not Applicable
How satisfied were you with the tour at Mother Earth Brewing Co.?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How satisfied were you with the overall taproom?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How satisfied were you with the beer itself?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. About Mother Earth Brewing Co.

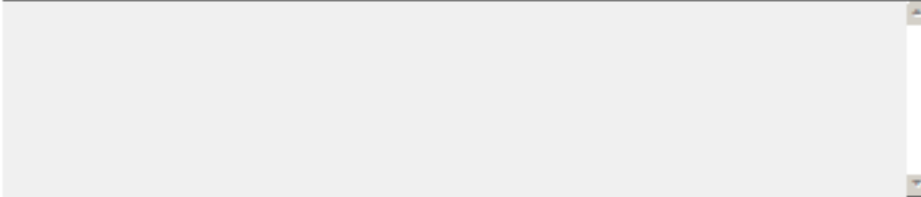
28. When you think about the tour at Mother Earth Brewing Co., what words come to mind?

A large, light gray rectangular text input area with a vertical scrollbar on the right side.

29. When you think about the taproom at Mother Earth Brewing Co., what words come to mind?

A large, light gray rectangular text input area with a vertical scrollbar on the right side.

30. Why did you recently choose to visit Mother Earth Brewing Co.?

A large, light gray rectangular text input area with a vertical scrollbar on the right side.

10. Thank you!!!

31. Thank you for taking this survey! If you have any questions, suggestions, or concerns that were not addressed in this survey, please list them below.

32. If you would like to be entered into the drawing for a \$50 gift card to Mother Earth Brewing Co., please fill out the following contact information. This information will be stored separately from your survey responses so that they remain anonymous. The drawing for the gift card will be in early May.

Thank you for your time and input! We know you are busy and appreciate you taking the time to take the survey. Be sure to check out Mother Earth Brewing Co. online (<http://www.motherearthbrewing.com/>)

Name

Email

Phone number

APPENDIX B: Factors Influencing Brand Loyalty: Aviator Survey

1. Informed Consent Page

Thank you for agreeing to complete this survey. The survey is being conducted by East Carolina University's Center for Sustainable Tourism to gather information about resident and visitor perceptions of North Carolina's Breweries. Breweries not only contribute to the economic base of communities but help to preserve our culture and our environment. Aviator Brewing Company wants to make sure your visit was a positive experience.

We ask that you respond to the questions in this study by being as honest as possible. AS A THANK YOU FOR PARTICIPATING IN THIS SURVEY, YOU WILL BE ENTERED INTO A DRAWING FOR A \$50 GIFT CARD TO AVIATOR BREWING CO. At the end of the survey, we ask for your contact information so that we can enter you in the drawing. This information will be stored separately from your survey responses so that they remain anonymous.

The questionnaire should take approximately 10-15 minutes of your time. Your participation in this study is voluntary and you may withdraw from the study at any time without penalty or loss of benefit. Your consent will be indicated by filling out the survey. There are no foreseeable risks to participating in the study. The results of this study may be published but no names will be used and individual responses will be maintained in confidence by the researchers. Anonymity and confidentiality will be assured.

Your participation will allow us to develop a greater understanding of who visits Aviator and why they chose Aviator over another brewery. The information obtained from the survey will be used to guide beer tourism development in North Carolina.

If you have any questions concerning the research study, please contact Alison Murray at murray11@students.ecu.edu. Thank you in advance for taking the time to share your insights with us, and thank you for visiting Aviator Brewing Company!

Sincerely,
Alison Murray, M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University
Greenville, North Carolina

2. About you

***1. What is your zip code/ postal code?**

2. What is your gender?

- ☐ Male
- ☐ Female

3. What is your primary form of work?

- ☐ Public Sector
- ☐ Private Sector
- ☐ Non-profit sector
- ☐ I have my own business
- ☐ I am retired
- ☐ I am a student

Other (please specify)

4. What is the year of your birth?

5. In what city and state were you born?

6. Of what race/ethnicity do you consider yourself?

- ☐ White
- ☐ Black or African American
- ☐ Asian
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ Hispanic

Other (please specify)

7. What level of education did you last complete?

- ☐ Other
- ☐ High School
- ☐ Technical School
- ☐ Community College
- ☐ Four-year College or University
- ☐ Advanced Degree

If you checked other, please elaborate here:

8. What is your annual household income?

- ☐ Less than \$30,000
- ☐ \$30,000-\$59,000
- ☐ \$60,000-\$89,000
- ☐ \$90,000-120,000
- ☐ More than \$120,000

3. About your involvement in the brewery industry

9. How long have you been regularly consuming beer? (years)

10. How long have you been regularly consuming craft brews? (years)

11. Have you ever worked in the brewing industry or as a bartender?

- ☐ Yes
☐ No

If yes, for how long? (years)

12. Have you ever experimented with home brewing?

- ☐ Yes
☐ No

If yes, for how long (years)

13. On a scale of 1-5, 1 being 'not at all' and 5 being 'very much so', would you consider yourself a beer enthusiast?

- ☐ 1 (Not at all)
☐ 2
☐ 3
☐ 4
☐ 5 (Very much so)

4. About your Visit

14. When another brand is on sale, I will generally purchase it rather than my preferred brand of beer

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
When shopping at a grocery store, I will generally purchase Aviator Beer regardless of whether another brand is on sale	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall I consider myself loyal to the Aviator Brand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. Including this past visit, how many times have you visited Aviator Brewing Co. in the last year?

- ☐ 1 visit
- ☐ 2-3 visits
- ☐ 4-5 visits
- ☐ 6-7 visits
- ☐ More than 8 visits

16. During your most recent visit to Aviator Brewing Co., did you take the tour?

- ☐ Yes
- ☐ No

17. During your most recent visit to Aviator Brewery, did you go to the taproom?

- ☐ Yes
- ☐ No

18. During your visit did you purchase a growler or souvenirs (shirts, keezies, etc) at the brewery? If so, please tell us what you purchased.

- ☐ Yes
- ☐ No

Purchased goods

19. After your visit did you buy Aviator Products (beer at a restaurant or in a store or t-shirts online)?

- ☐ Yes
- ☐ No

20. If you're not a resident of the area, what was your primary reason for visiting Puquay-Varina?

21. Will your recent visit with Aviator Brewing Co. influence visiting other breweries in the future?

☐ Yes

☐ No

If yes, please explain what influence it will have. If no, why not?

22. Will your visit to Aviator Brewing Co. inspire/encourage you to drink more craft beers?

☐ Yes

☐ No

If yes, please explain what influence it will have. If no, why not?

5. About brewery tours in general

23. Please indicate which response best illustrates your level of agreement.

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
The tours at Aviator Brewing Co. help to establish a customer bond with the brand.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The tours at Aviator Brewing Co. help to explain the brewery's environmental/green operations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumers increase their knowledge of the brewing process through brewery tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumers who visit breweries have a better understanding about the product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brewery tours provide an added recreational activity for the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aviator Brewing Co. tours educate visitors about aspects of Fuquay-Varina's history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brewery tours are a low-cost entertainment option for community groups, business travelers, groups of friends, and others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. About your environmental preferences and the brewery's connection with Fuqu...

24. The following questions are about your environmental preferences when choosing to buy beer. Please select the best answer choice for each question.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
Breweries should take measures to lessen their impact on the natural environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the price were the same, I would switch from my usual beer brand to an environmentally friendly beer option	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the price were 10% more expensive, I would switch from my usual beer brand to an environmentally friendly beer option	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Green practices enhance the image and brand of the brewery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. These questions are about brewery tours and their relationship with the host community. Please select the best answer choice for each question.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
Aviator Brewing Co. celebrates the local culture and traditions of Fuquay-Varina through its products and events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I personally receive social benefits from Aviator Brewing Co. (improved quality of life, meeting interesting people, and adding vibrancy to Fuquay-Varina)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aviator Brewing Co. provides economic benefits to Fuquay-Varina (income, employment, taxes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitors to Aviator Brewing Co. also spend money at other Fuquay-Varina businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The additional tourists that Aviator Brewing Co. attracts positively impacts the town	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aviator Brewing Co. has had a positive impact on the tourism industry in Fuquay-Varina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. About uniqueness in the brewing industry

26. Please select the best answer choice for each question.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not Sure/ Not Applicable
I tend to be a fashion leader rather than a fashion follower in what I eat and drink	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When I travel, I like to buy the local craft beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would prefer to have craft beer rather than a beer from a large-scale brewery.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When ordering beer at a restaurant or bar, I rarely pass up the opportunity to drink a craft beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like to be one of the first to try a newly released or seasonal beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I enjoy buying beers that are unique	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

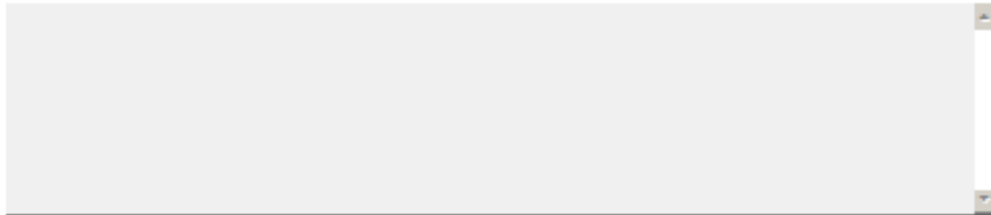
8. About your satisfaction with Aviator Brewing Co.

27. Please select the best answer choice for each question.

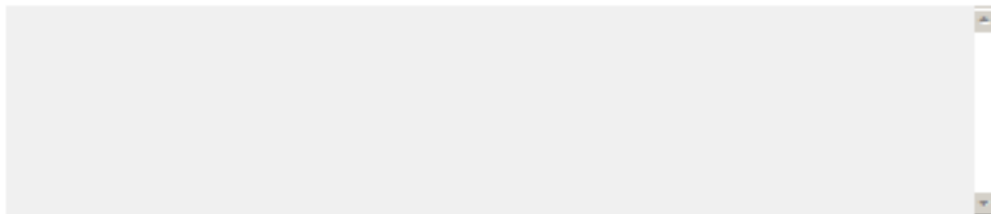
	Very Satisfied	Satisfied	Neither Satisfied nor dissatisfied	Dissatisfied	Strongly dissatisfied	Not Sure/ Not Applicable
How satisfied were you with the tour at Aviator Brewing Co.?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How satisfied were you with the overall taproom?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How satisfied were you with the beer itself?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. About Aviator Brewing Co.

28. When you think about the tour at Aviator Brewing Co., what words come to mind?

A large, empty rectangular text input area with a light gray background and a thin black border. On the right side, there is a vertical scrollbar with a small gray handle.

29. When you think about the taproom at Aviator Brewing Co., what words come to mind?

A large, empty rectangular text input area with a light gray background and a thin black border. On the right side, there is a vertical scrollbar with a small gray handle.

30. Why did you recently choose to visit Aviator Brewing Co.?

A large, empty rectangular text input area with a light gray background and a thin black border. On the right side, there is a vertical scrollbar with a small gray handle.

10. Thank you!!!

31. Thank you for taking this survey! If you have any questions, suggestions, or concerns that were not addressed in this survey, please list them below.

32. If you would like to be entered into the drawing for a \$50 gift card to Aviator Brewing Co., please fill out the following contact information. This information will be stored separately from your survey responses so that they remain anonymous. The drawing for the gift card will be in early May.

Thank you for your time and input! We know you are busy and appreciate you taking the time to take the survey. Be sure to check out Aviator Brewing Co. online (<http://www.aviatorbrew.com/>)

Name

Email

Phone number

APPENDIX C: Participant Sign-Up List: Mother Earth



Enter to WIN a \$50 gift card to Mother Earth Brewing Co.!!

Yes! I would like to offer my opinion about Mother Earth Brewing Co. by taking part in a survey. I understand that a link to the online survey will be e-mailed to me in the next week. I also understand that my email will NOT be given or sold to a third party, or used in any way beyond those I designate below.

Zip code	Name	Email

APPENDIX D: Participant Sign-Up List: Aviator



Enter to WIN a \$50 gift card to Aviator Brewing Co.!!

Yes! I would like to offer my opinion about Aviator Brewing Co. by taking part in a survey. I understand that a link to the online survey will be e-mailed to me in the next week. I also understand that my email will NOT be given or sold to a third party, or used in any way beyond those I designate below.



Zip code	Name	Email

APPENDIX E: Initial Contact Email: Mother Earth

Good Afternoon!

Thank you for signing up to take the Mother Earth Brewing Company customer survey. This survey is a way to collect data for my Masters of Science thesis in the Sustainable Tourism program at East Carolina University titled 'Factors Influencing Brand Loyalty to Microbreweries in north Carolina'. Recently you made a trip to Mother Earth Brewing Company and hopefully had a chance to take the tour or enjoy some beer in the taproom. Tourism to breweries not only contributes to the economic base of rural communities but also helps to preserve and cherish our culture. Mother Earth Brewing Company wants to provide a great experience for the visitors as well as the local residents. By completing this survey you will help Mother Earth Brewing Company and the local destination marketing organization get a better understanding of visitors' perceptions of the area.

The survey should only take approximately 10-15 minutes of your time. To take the survey, simply copy and paste the link below into your browser.

<http://www.surveymonkey.com/s/MotherEarthBrewingCustomerSurvey>

Thank you for taking the time to complete this survey your responses are very important to Mother Earth Brewing Company and the Center for Sustainable Tourism at East Carolina University.

Sincerely,
Alison Murray
M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University

APPENDIX F: Initial Contact Email: Aviator

Good Afternoon!

Thank you for signing up to take the Aviator Brewing Company customer survey. This survey is a way to collect data for my Masters of Science thesis in the Sustainable Tourism program at East Carolina University titled 'Factors Influencing Brand Loyalty to Microbreweries in north Carolina'. Recently you made a trip to Aviator Brewing Company and hopefully had a chance to take the tour or enjoy some beer in the taproom. Tourism to breweries not only contributes to the economic base of rural communities but also helps to preserve and cherish our culture. Aviator Brewing Company wants to provide a great experience for the visitors as well as the local residents. By completing this survey you will help Aviator Brewing Company and the local destination marketing organization get a better understanding of visitors' perceptions of the area.

The survey should only take approximately 10-15 minutes of your time. To take the survey, simply copy and paste the link below into your browser.

<http://www.surveymonkey.com/s/AviatorBrewingCoCustomerSurvey>

Thank you for taking the time to complete this survey your responses are very important to Aviator Brewing Company and the Center for Sustainable Tourism at East Carolina University.

Sincerely,
Alison Murray
M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University

APPENDIX G: Secondary Email Request: Mother Earth

Good Morning!

Thank you again for signing up to take the Mother Earth Brewing Company customer survey. Because of the anonymity of the survey, I cannot sift out the addresses of people who have already taken the survey. If you have already taken the survey, thank you! If not, please take the 10-15 minutes to complete it.

This survey is a way to collect data for my Masters of Science thesis in the Sustainable Tourism program at East Carolina University titled 'Factors Influencing Brand Loyalty to Microbreweries in north Carolina'. Recently you made a trip to Mother Earth Brewing Company and hopefully had a chance to take the tour or enjoy some beer in the taproom. Tourism to breweries not only contributes to the economic base of rural communities but also helps to preserve and cherish our culture. Mother Earth Brewing Company wants to provide a great experience for the visitors as well as the local residents. By completing this survey you will help Mother Earth Brewing Company and the local destination marketing organization get a better understanding of visitors' perceptions of the area.

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Thank you for taking the time to complete this survey your responses are very important to Mother Earth Brewing Company and the Center for Sustainable Tourism at East Carolina University.

Sincerely,
Alison Murray
M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University

APPENDIX H: Secondary Email Request: Aviator

Good Morning!

Thank you again for signing up to take the Aviator Brewing Company customer survey. Because of the anonymity of the survey, I cannot sift out the addresses of people who have already taken the survey. If you have already taken the survey, thank you! If not, please take the 10-15 minutes to complete it.

This survey is a way to collect data for my Masters of Science thesis in the Sustainable Tourism program at East Carolina University titled 'Factors Influencing Brand Loyalty to Microbreweries in north Carolina'. Recently you made a trip to Aviator Brewing Company and hopefully had a chance to take the tour or enjoy some beer in the taproom. Tourism to breweries not only contributes to the economic base of rural communities but also helps to preserve and cherish our culture. Aviator Brewing Company wants to provide a great experience for the visitors as well as the local residents. By completing this survey you will help Aviator Brewing Company and the local destination marketing organization get a better understanding of visitors' perceptions of the area.

The survey should only take approximately 10-15 minutes of your time. To take the survey, simply copy and paste the link below into your browser.

<http://www.surveymonkey.com/s/AviatorBrewingCoCustomerSurvey>

Thank you for taking the time to complete this survey your responses are very important to Aviator Brewing Company and the Center for Sustainable Tourism at East Carolina University.

Sincerely,
Alison Murray
M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University

APPENDIX I: Final Email Request: Mother Earth

Good Afternoon!

This is the **LAST CHANCE** to take the Mother Earth Brewery customer survey and be entered in to *win \$50* to the brewery.

If you have already taken the survey, thank you! Due to the anonymity of the survey, I cannot take names off the list of people who have already taken the survey. This is the **last email** you will receive from me.

This survey is a way to collect data for my Masters of Science thesis in the Sustainable Tourism program at East Carolina University titled 'Factors Influencing Brand Loyalty to Microbreweries in North Carolina'. Recently you made a trip to Mother Earth Brewing Company and hopefully had a chance to take the tour or enjoy some beer in the taproom. Tourism to breweries not only contributes to the economic base of rural communities but also helps to preserve and cherish our culture. Mother Earth Brewing Company wants to provide a great experience for the visitors as well as the local residents. By completing this survey you will help Mother Earth Brewing Company and the local destination marketing organization get a better understanding of visitors' perceptions of the area.

The survey should only take approximately 10-15 minutes of your time. To take the survey, simply copy and paste the link below into your browser.

<http://www.surveymonkey.com/s/MotherEarthBrewingCustomerSurvey>

Thank you for taking the time to complete this survey your responses are very important to Mother Earth Brewing Company and the Center for Sustainable Tourism at East Carolina University.

Sincerely,
Alison Murray
M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University

APPENDIX J: Final Email Request: Aviator

Good Afternoon!

This is the **LAST CHANCE** to take the Aviator Brewery customer survey and be entered in to **win \$50** to the brewery.

If you have already taken the survey, thank you! Due to the anonymity of the survey, I cannot take names off the list of people who have already taken the survey. This is the **last email** you will receive from me.

This survey is a way to collect data for my Masters of Science thesis in the Sustainable Tourism program at East Carolina University titled 'Factors Influencing Brand Loyalty to Microbreweries in North Carolina'. Recently you made a trip to Aviator Brewing Company and hopefully had a chance to take the tour or enjoy some beer in the taproom. Tourism to breweries not only contributes to the economic base of rural communities but also helps to preserve and cherish our culture. Aviator Brewing Company wants to provide a great experience for the visitors as well as the local residents. By completing this survey you will help Aviator Brewing Company and the local destination marketing organization get a better understanding of visitors' perceptions of the area.

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Sincerely,
Alison Murray
M.S. Sustainable Tourism Student
Center for Sustainable Tourism
East Carolina University

APPENDIX K: ECU UMC IRB Approval Letter



EAST CAROLINA UNIVERSITY
University & Medical Center Institutional Review Board Office
1L-09 Brody Medical Sciences Building · Mail Stop 682
600 Moyer Boulevard · Greenville, NC 27834
Office 252-744-2914 · Fax 252-744-2284 · www.ecu.edu/irb

Notification of Initial Approval: Expedited

From: Social/Behavioral IRB
To: [Alison Murray](#)
CC: [Carol Kline](#)
Date: 3/27/2012
Re: [UMCIRB 12-000542](#)
Factors Influencing Brand Loyalty to Microbreweries in North Carolina

I am pleased to inform you that your Expedited Application was approved. Approval of the study and any consent form(s) is for the period of 3/27/2012 to 3/26/2013. The research study is eligible for review under expedited category #7. The Chairperson (or designee) deemed this study no more than minimal risk.

Changes to this approved research may not be initiated without UMCIRB review except when necessary to eliminate an apparent immediate hazard to the participant. All unanticipated problems involving risks to participants and others must be promptly reported to the UMCIRB. The investigator must submit a continuing review/closure application to the UMCIRB prior to the date of study expiration. The Investigator must adhere to all reporting requirements for this study.

The approval includes the following items:

Name	Description
Aviator Intro.docx History	Recruitment Documents/Scripts
MEB Intro.docx History	Recruitment Documents/Scripts
Proposal.docx History	Study Protocol or Grant Application
Thesis Instrument3.docx History	Surveys and Questionnaires

The Chairperson (or designee) does not have a potential for conflict of interest on this study.

IRB00000705 East Carolina U IRB #1 (Biomedical) IORG0000418
IRB00003781 East Carolina U IRB #2 (Behavioral/SS) IORG0000418 IRB00004973
East Carolina U IRB #4 (Behavioral/SS Summer) IORG0000418